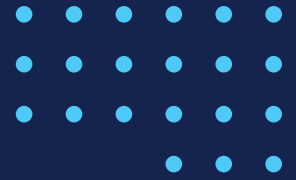ENUMERATE
CENTRAL

CASE STUDY

Coventry Group Finds Balance, Growth, and Vision

Building From the Ground Up

It was 2007 when Beth and Mark first heard about HOA management. A family friend who was an attorney in their town of Winchester, Virginia said the area needed a management company that operated locally and suggested that he and Beth take on the task.

Beth's years working in H.R. and consulting provided her with extensive business experience and the ability to ramp up her knowledge quickly. It also helped that she was accustomed to taking on new endeavors. "I've always had some kind of business because I wanted to be home with my kids, so I had run a couple of different businesses," she said. At that moment, she didn't have one and was ready for another adventure.

Starting with one HOA, the newly established Coventry Group Community Management began to grow, slowly at first and primarily through word of mouth.

While her business partner stayed in the background, Beth handled both the big picture and day-to-day responsibilities. She soon brought her husband, Mark, on board as a community manager and eventually as President.

Coventry Group

When Beth Schloemer, a serial entrepreneur and mother of eight, decided to launch an HOA management company, she didn't know a lot about the HOA industry or how she wanted her business to develop. But twelve years later, that has all changed. In that time, she has achieved success through hard work, business acumen, and having the right technology.

Beth and Mark have solidified their vision of a thriving family business that is integral to the community.

Outgrowing Technology

As the number of HOAs Coventry Group managed increased, work became more time-consuming and challenging, particularly without the right technology and tools that could handle the growth.

Tracking the business manually using Excel, Microsoft, and QuickBooks was burdensome, time-consuming, and prone to human error, Beth said. "All of our letters went out via Word, which made tracking letters for individual homeowners difficult. The paper trail for violations and collections was hard to maintain."

But the couple was committed to delivering excellent service to their communities. "Mark and I worked our tails off," she recalls. It wasn't just the couple who worked either; in the early days of the business, they recruited their older children to help. Beth remembers many times the kids sat on the living room floor and stuffed envelopes for mailings. "When we say this is a family-owned business, we're not kidding!"

When Coventry added their 12th HOA, Beth approached her business partner, suggesting they purchase HOA specific software, but the partner disagreed that the software was needed. However, her partner wasn't working in the trenches to see the shortcomings of the current tools like she was.

The turning point came in 2010 when Coventry's first HOA and largest contractor left for another management company. "Although the HOA liked us as a company and liked the way we did business, they felt like we couldn't handle the workload," Mark said. And the HOA was right. "Mark and I agreed with that. We couldn't handle it." Beth adds.

As difficult as it was to lose a client, that loss persuaded the business partner to finally agree to invest in HOA software. Finding software was easy. "I literally just did a Google search," Beth said. "I put in 'HOA management,' and TOPS Pro came up. We looked at them and thought 'wow!'" After a demo, Beth and Mark were convinced. With the implementation of TOPS Pro, Beth and Mark saw unlimited potential for their business. "We started understanding what we could do—and what we hadn't been able to do in the past because we didn't have the capability," Beth said.

This realization highlighted a difference in philosophy between the partner and Beth and Mark. For the partner, the business was a small investment and he was reluctant to spend money beyond what was necessary, Beth explained. But for Beth and Mark, the business was their livelihood. They wanted to make strategic investments: a postage machine, a copier, HOA-specific software—things that would yield long-term benefits. "We knew these changes were the way to grow," Beth said.

Thriving in Independence

Beth and Mark bought out their partner and immediately noticed a boost. Free to organize the business as they thought made the most sense. They hired different staff and positioned the company for the future. "Within the first 18 months from the time we bought him out, we grew 25%," Beth said.

As they grew, Beth and Mark sharpened their vision for what they wanted Coventry Group to be. It wasn't just a business; it was a way to improve the community. One of the most significant accomplishments is helping a homeowner have success after a rough patch.

Sometimes they'll meet a homeowner who is behind in their assessment and is feeling defensive, argumentative, and stressed. "But when we come in and say 'Look, we'll work with you and help you get out of your debt. We won't send you to collections.' Those sorts of things are so rewarding, when you see somebody come out of a bad financial situation and you were actually able to help them with that."

Being able to do that reminds Beth of the bigger vision for the business. "It's not just about the bottom line," Beth said. "It's about making the community better; helping people make their neighborhood a place they want to live."

Today, with 51 communities and 6000 doors, Coventry Group is cruising along. It is still busy, but with five additional employees, the Schloemers' children no longer stuff envelopes. Beth and Mark have more time to run their business, while developing relationships with community residents, interacting with board members, and homeschooling their youngest children.

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> **It's about making the community better; helping people make their neighborhood a place they want to live.**
>
> **BETH SCHLOEMER**
> COVENTRY GROUP

CENTRAL ∷. For Increased Flexibility

Beth and Mark implemented TOPS Pro in 2010 and in 2017 they learned about the advantages of Enumerate's latest platform offered, Central.

After attending several Enumerate Central presentations, the product's ability to enhance customer service was evident, Beth said. "When I saw that a homeowner had 24-hour access to their account and could see their balance and make a payment whenever they wanted, I was sold."

Coventry Group transitioned three communities in mid-2017, and on January 1, 2018, switched the remaining neighborhoods over. Rather than continue to switch a few communities at a time, Beth decided to go all in so her team would only need to use one system.

A transition of that magnitude required working closely with Enumerate, Beth said. The similarities between the two businesses made the process smooth. "I feel [Enumerate is] a part of Coventry Group. I think their business philosophy is very similar to our own. Their company is much larger, but they have a very similar culture to our company," she said. Those similarities include being customer-centric and dedicated to doing the job well.

~40 hours saved monthly

Enumerate Central Helps Run the Business More Efficiently

Even with additional staff, growing a business and a family requires working smarter. Central helps with that, Beth said. "We've learned a lot about taking things out of the company that we can outsource. Central has made that easier."
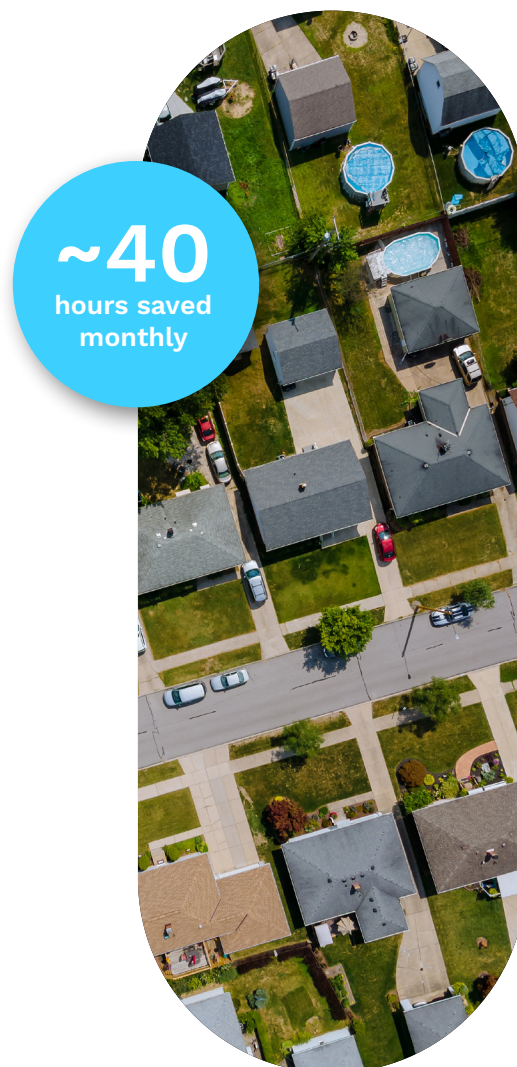
Less Time Invoicing

Invoicing, for example, used to take Beth two days to complete each month. Now, with Central, she outsources invoicing with Enumerate's partner, SouthData, and saves nearly 80% of her time, now spending less than half a day on the task.

Fewer Controversies with Violations

Building relationships with homeowners is key to managing a homeowner association. That relationship can be at risk when a homeowner has a violation. But Central makes the process easier and more apparent, Beth said. Photos of the offense are uploaded directly into the report for the homeowner to see, so there is no dispute.

Faster Audits

Central streamlines the audit process. Before Central, Beth's CPA would spend two weeks in their office going through reports. Now, it takes 10% of that time. "Our CPA said it's the easiest program he's ever used. Before, we had to provide him copies of numerous documents. Now, we don't have to do any of that," she added. "We just provide the CPA with a login and he can access what he needs, when he needs it. They come in for a day and a half or two days, and they ask for very little."

80%
reduction of invoicing time

90%
reduction of audit process

> ❝
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> **BETH SCHLOEMER**
> COVENTRY GROUP

Enumerate Engage Changes the Game

One of the aspects that attracted Beth and Mark to Central was the ability for owners to see their own records. "Engage was a real game-changer," Beth said. Homeowners can go online, log into the secure portal and view their current balance, account history, open violation tickets, and work orders.

Beth said before, the phone calls were constant. "We'd come in you have ten voicemails because people came home from work and saw a violation or bill in their mailbox. And they would call the office, but we're closed because we operate on the same business hours." With Engage, homeowners no longer have the frustration of wanting the answers to basic questions after hours. "Instead of having to wait until morning for us to play telephone tag with them, they can go in their portal anytime they want," She said. "The customers are happier!"

Even with the flexibility the Central functions provide, there are many more ways to explore the platform, Beth said. Once Coventry Group moved all of its communities to Central, Beth and Mark decided to take their time adding in the various functions, like the lockbox or signature features. They wanted to give their staff time to incorporate changes gradually. But even now, they see the possibilities. "I think we've just scratched the surface of what we can do with Central," Beth said.

They also see the impact. "Melanie said to me the other day that I needed to give her more to do," Beth said, chuckling. "She's in and out of the system so quickly now that about halfway through each month, when all the financials are cleaned up, she's got extra time on her hands." Beth adds, "I think Engage is the reason, she's not making ten calls a day anymore!"

Flexibility of the Cloud Platform

Being dedicated to work and family is a constant juggling act, and Beth and Mark have it down to a science. Whether sending an invoice from home, answering a homeowner's email on the go, or responding to a board member's concern in real-time, the couple relies on the Enumerate Central's cloud platform to get work done, wherever they are.

Using Central helps Beth and Mark manage their business effectively. It also gives them the bandwidth and flexibility to make their business a reflection of their vision and an integral part of the community.

> "It's easy to use and learn. Homeowners can log into their accounts, reducing call time at the office. Managers can work from anywhere."
>
> **BETH SCHLOEMER**
> COVENTRY GROUP

Whether You Manage a Single Community or an Entire Portfolio –
You Can Do More With CENTRAL

Central Is an Easy to Use Software That Is Trusted by Thousands of Property Managers and Accountants

Your life is a windstorm of details: accounts payable and receivable, collections, violations, homeowner relations, service requests, vendors, work orders – you know the routine.

You need a solution that's designed specifically to help you better manage your community.
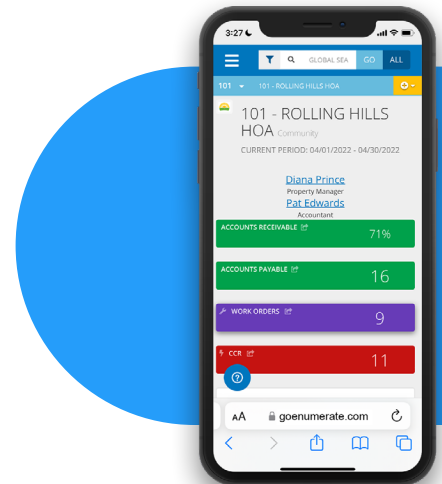
Get Funds Quicker
The powerful accounting features of Central makes Account Payables and Receivables effortless and it is completely customizable. It also includes Enumerate Payments which allows you to accept recurring payments safely and securely.

Easily Lookup Owner Info
The incredible management tools of Central gives you a quick snapshot of your entire portfolio. Within seconds, you can explore each community and easily access key information.

Reduce Phone Calls by 15%
Central provides state of the art communications through our Enumerate Engage. Homeowners can get updates on tickets, send questions, or review their account which reduces phone tag and saves you hours.

Save Up To 40 Hours Per Month
You can automate your workflow which reduces hours spent on manual processes. Handle violation management quickly and easily, right from your mobile device.

Do Your Job from Anywhere
Since Central is in the cloud, you can enjoy more freedom from the office. Central also allows you ro collaborate with your entire team at the same time from different places.

Impress Your Board Members
Our reporting engine allows you to create dozens of detailed reports quickly and efficiently. You can easily share documents with board members, staff and residents.

<u>Let us</u> count the ways.

You don't need five different solutions to manage one community.
The Enumerate Suite has everything you need in one place.

Award-Winning Support at Your Fingertips.

In addition to the amazing features of Central, Enumerate offers our clients the industry's smartest and most helpful customer service:

• Industry-exclusive Customer Success Team staffed with PCAMs.
• A Quality Assurance team made up of CAM professionals.
• A dedicated, expert in-house Support Team.
• A standalone Implementation Team.

Other companies sell property management software.

We invented it.
Since 1985, more CAM professionals have trusted Enumerate than all other competitors combined. If you are looking for a technology partner that's dedicated to your success, then Enumerate is the clear choice.

Get a FREE Consultation.
Call today at 727-293-4599.

Are you looking for an easier way to do your job? Then you're a perfect candidate for a free phone consultation. We'll listen carefully to your needs and problems. Then we'll come up with expert ideas you can use right away to make improvements, boost productivity and banish your worries.

• We promise not to spam you.
• There's no obligation.
• It's 100% FREE.