Customer Success:
FPI Management

FPI Management's corporate culture is grounded in HEART (Humility, Excellence, Accountability, Respect, and Teamwork). Since 1968, these values have been the hallmark for success. FPI manages over 103,000 units in the US and was ranked as the 3rd largest affordable multi-family property management company by NAHMA Affordable 100 in 2017 and as the 6th largest apartment manager by NHMC in 2016.

FPI MANAGEMENT

Goals

- Automate the lease application process

- Reinforce security and guarantee paperwork is well-documented

- Remain compliant by ensuring the processed paperwork is accurate

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>
> **Kristen Hernandez**
> Senior IT Director, FPI Management

Challenge

A leading property management firm with over 3,000 employees, FPI services clients that range from institutional investors to international real estate investment firms, financial institutions, multi-family developers, private investors, and more.

A big part of their service involves managing lease applications for affordable housing units, like tax credit, HUD, and Section 8 housing, for property owners. To apply for housing and receive certain tax credits, potential tenants must prove that they are low-income individuals by providing W2s and other income-related documents.

Part of this federally mandated program requires auditors to do a file review of each lease application to make sure that applicants are, in fact, qualified for the tax credits.
In order for FPI's clients to be compliant and follow these regulations, it's crucial that the paperwork and information that FPI manages during the lease application process is 100% accurate.

"*The process needs to be secure, well-documented, and streamlined – which is why AODocs is a good fit for us,*" explained Kristin Hernandez, Senior IT Director at FPI.

Story

Since FPI was already using G Suite, they were looking to replace their previous system with something that would work well with Google but also provide security improvements and streamline their processes.

They considered Microsoft SharePoint but realized that the level of configuration would require too much time and resources.

"*What I loved instantly about AODocs is that it was very straightforward. It didn't require full time programmers and it fit right into our G Suite environment,*" explained Kristin. "*I also knew that the unlimited space would come in handy since we were using Google Drive for storage. It was just a good, happy pairing.*"

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Results

FPI employees now have an easy-to-use system that makes every part of their process run more efficiently.

"*AODocs has given our auditors, on-site, and compliance teams a greater degree of transparency*," explained Kristin.

The workflow process allows the teams to monitor the time and location of each record processed in the system themselves, thereby decreasing support ticket requests.
In just the first month, 4,000 lease applications were already processed in FPI's AODocs library. Now, they're creating and managing 50,000 lease applications each year on the platform. FPI also needed to establish additional libraries to service the various tax credit programs.

"*We were able to establish our first library, copy the setup, and make changes to quickly establish the additional libraries*." explained Kristin. "*The support from the AODocs team, from sales to training and technical support, has been phenomenal.*"

Now that FPI has their lease application process up and running, they're looking to AODocs to help bring better structure and automation to further improve other processes within their departments.

AODocs

A modern, intelligent content services platform designed to address content chaos within all departments and across all industries