

Case Study

# Sentry Management Inc.

How Sentry Management Improved Vendor  
Proposals and Reduced Vendor Bidding Time by  
73% for 300 Community Managers

# About Sentry Management, Inc.

Sentry Management, Inc. is a national homeowner and condominium association management company serving nearly 1M homeowners and 15,000 board members. With an eye on growth, the company is expanding every year, currently operating in 40 markets across 17 states.

## **Kregg Hale**

Senior Vice President - focused on client retention, employee retention, and profitability.

## **Anne Marconi**

Project Manager - dedicated to finding improvements for Community Managers and improving the employee experience, focused on reducing risk throughout the organization.



# The Problem

Sentry Management's 300+ Community Managers were spending significant time procuring vendors and compiling proposals for their condominium and HOA boards.

The process: After a manager issued a request for proposal (RFP) through email, phone call, and in-person conversations, vendors would typically send responses back across each of these channels and in many formats (PDFs, emails, and printed collateral.)

Each manager would then spend hours compiling bids and vendors into a manual spreadsheet, attempting to compare different proposals against criteria they often didn't understand fully. (Community Managers are skilled in managing communities, projects, and vendors, not necessarily the detailed technical aspects of painting, landscaping, or paving.)

As a result, the company looked for a solution to more fully support the role of the manager by:

- ✓ Simplifying the vendor bidding process.
- ✓ Providing a more robust set of technical questions to obtain better vendor information.
- ✓ Improving the professionalism of the comparison.
- ✓ Choosing the most qualified vendor.

It was recognized that the entire team involved in the effort was often bogged down with followups, data collection, and other administrative tasks.



*"Our community managers needed a way to reduce the administrative tasks related to RFPs, find a better way to make sound decisions about vendors, and present a professional, Sentry-branded proposal to their boards."*

- Anne Marconi,  
Project Manager, Sentry Management



# The Solution

Sentry Management needed a solution that would scale across its properties and expand with their ambitious growth plans. Several providers of bid management solutions were vetted and as a result of the research, Building Engines' bid management solution (previously Synlio) was selected as it was determined that their software and process best met the need by delivering a faster, more comprehensive, and more professional way to manage the competitive bidding process.



*"This solution was a faster,  
more comprehensive, more  
professional way to manage  
the RFP imperative."*

- Anne Marconi,  
Project Manager, Sentry Management



## RFP Creation Tools and Templates

Bid Management provided managers with Master Templates created by subject matter experts. This enabled the managers to ask critical questions of vendors they would have otherwise missed as well as reduce the risk of choosing the wrong vendor.

## Vendor Discovery Network

Building Engines' Vendor Partner Network gave Sentry's managers more options to choose from, increasing their chances of finding the best possible option and discovering new, certified, local vendors for any job.

# The Solution

## Automated Follow up

The artificial intelligence assistant within Bid Management automatically handled email reminders to vendors to hold them to deadlines, replacing declined vendors and nonresponsive vendors with new options instantly.

## Consolidated Platform

Sentry's 300+ managers were freed from manual spreadsheets and digging through emails / mail, instead relying on Bid Management to manage the full, end-to-end bidding process.

Because the software's activity log stores every aspect of the vendor bidding process in real time, Sentry's managers had complete transparency and the ability instantly see all vendor interactions.

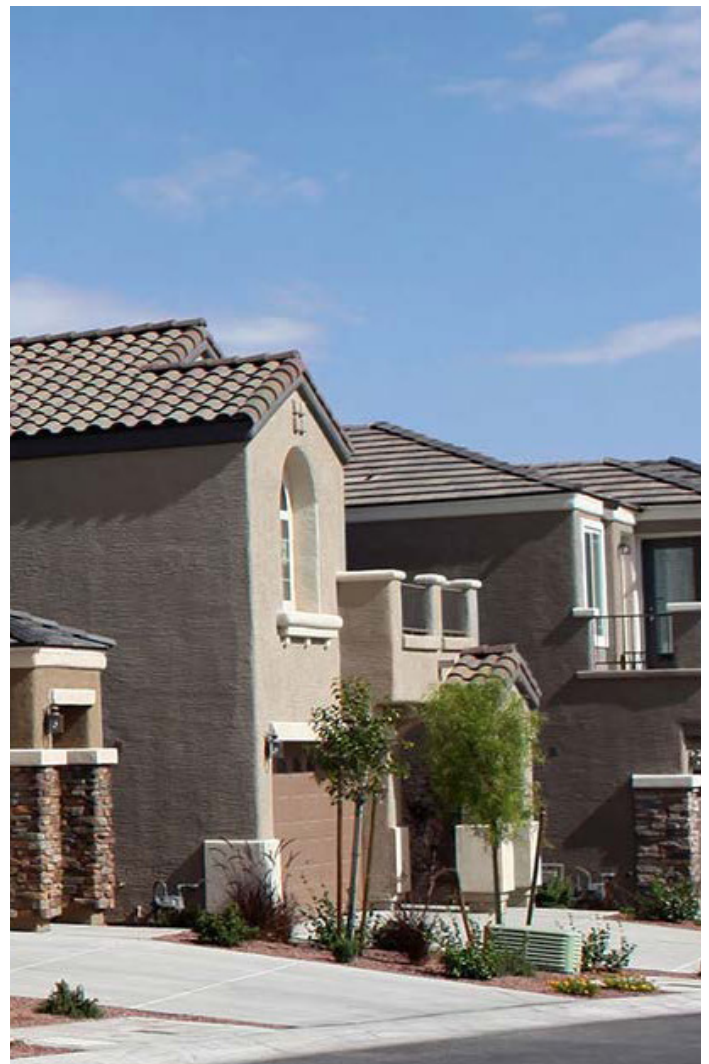
*"Whether on their phones or computers, Bid Management provides our managers with ONE place to go for everything they need about a bid."*

- Anne Marconi,

## Comparative Matrix

The most-loved feature for Sentry was the comparative matrix, which allowed managers to instantly generate an "apples-to-apples" comparison report of all vendors, making a more informed decision on awarding the winning bid.

The output report comes fully branded with Sentry Management colors and logo, giving each manager a highly professional way of presenting bids.



# The Results

As a result of moving to Bid Management, the company was able to:



## Save Time

Because all tenant broadcasts are centralized through one hub, CBRE can prove when notifications were sent. In the event of a tenant mistakenly claiming that property management failed to send a notification, the team can quickly pull up a detailed history to prove communication.



## Reduce Risk

The expert questions provided in Bid Management enabled managers to ask the right questions of vendors and collect the right information for more thorough bids.



## Expand Vendor Options

Having access to Building Engines' large vendor network also expanded the company's exposure to options.

*"It may have taken our managers 30-60 minutes to just create an RFP in the past. Now, with Bid Management, it takes 15 minutes up front, and saves countless hours across the whole process."*

**-Annie Marconi**



*"We were working with the same vendors out of habit. Using Building Engines' vendor network to expand our reach has been very helpful. 50% of the time, we choose a new vendor that we discovered through Bid Management."*

**-Annie Marconi**

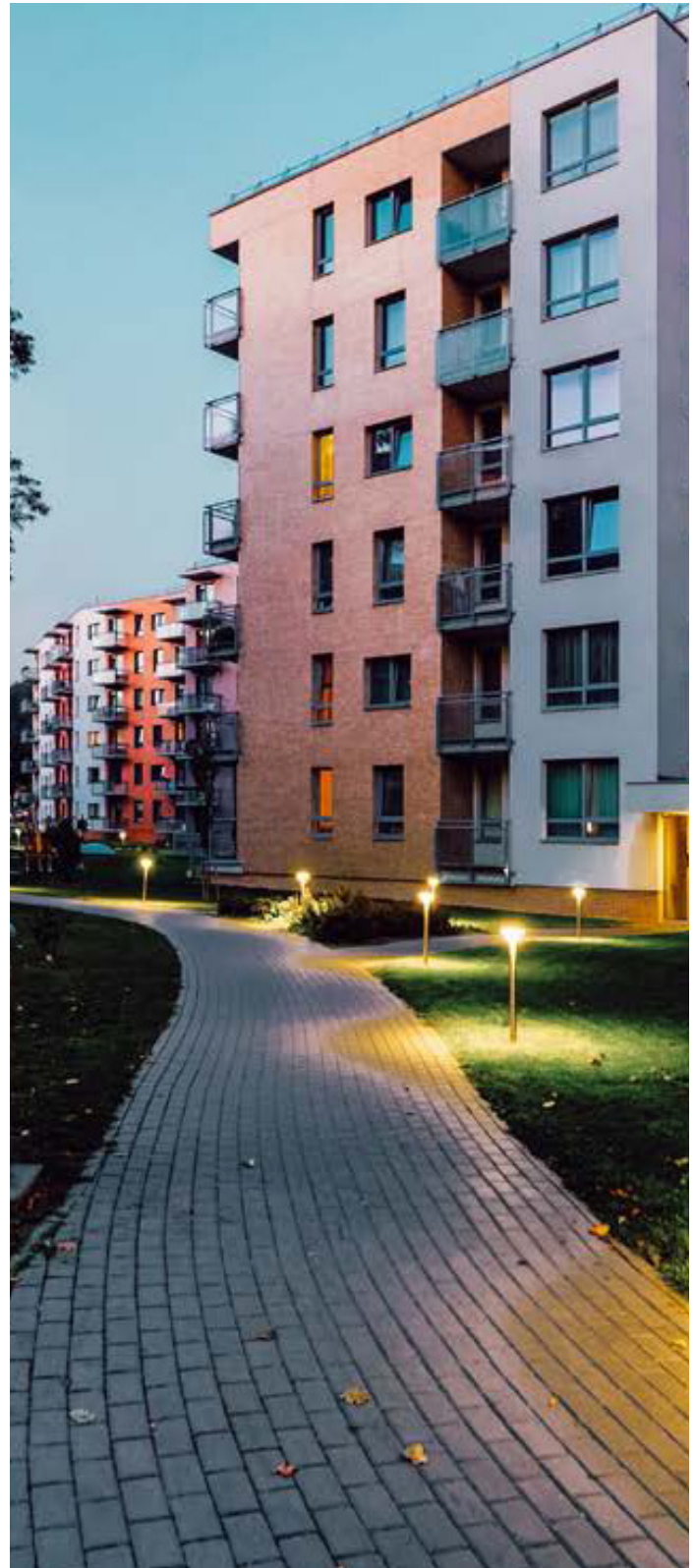


### Improve Trust and Professionalism

The simplicity and professional quality of reports generated allowed managers to foster a great sense of trust and transparency with customers.

*"What we need managers doing is managing relationships with the board. Bid Management gives them more time to do that, focusing on the things that matter, and improving our client retention."*

**-Annie Marconi**



# About Building Engines

Building Engines improves net operating income across the world's most successful Commercial Real Estate portfolios. Our customers increase their revenue, deliver the best occupant experience, and reduce their operating costs using our innovative building operations software platform.

**Exceptional Building Operations. Extraordinary Business Outcomes.**



## ADDRESS

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