



PORTFOLIO MODULE



WORK SMARTER, NOT HARDER.

CINC's Portfolio module makes it easy to manage tasks and maintain operational oversight across portfolios. It is the most comprehensive portfolio management tool in the industry, providing a one-stop destination for information that allows managers to streamline and optimize workflow. Plus, reporting is simple with this centralized solution, giving visibility to leadership on the everyday tasks of managers to keep an association running smoothly.

PROBLEM

Association management involves staying on top of numerous tasks that can quickly grow out of control if not well organized. Managers often store information in a multitude of places ranging from sticky notes to outdated spreadsheets. This makes task tracking and reporting work progress to leadership difficult, which can lead to friction in the association hierarchy.

SOLUTION

Provide a centralized task management solution that enables managers to easily track activity across portfolios, streamlining workflow and efficiency. With all information in one place, reporting on management activity is simple and provides a layer of transparency into the unseen operational work done by managers everyday.



CINC Systems

PORTFOLIO MODULE

CINC's Portfolio module is loaded with features to increase efficiency and productivity, with benefits for each association stakeholder.



MODULE FEATURES

ORGANIZE INFORMATION TO OPTIMIZE EFFICIENCY

- **Management Plans:** Allows users to create a plan of all projected activity and related details such as due dates, person responsible, and when to begin work. The system then creates action items based on this information, establishing an efficient and functional roadmap to stay on track.
- **Maintenance Calendar:** Allows users to generate an ongoing automated maintenance calendar to ensure work is completed on time while optimizing productivity and workflow.
- **Maintenance Items:** Allows users to manage maintenance work orders with a streamlined process that keeps track of multiple vendors across different maintenance categories.
- **Action Items:** Allows users to track tasks, link information, add notes, change status, add attachments and more to improve overall productivity.
- **Management Summary Reports:** Provides visibility on work activity that can be easily shared with leadership.
- **Customizable dashboards:** Allows work tasks to be arranged according to each individual's personal work style and priorities.

STAKEHOLDER BENEFITS

DISCOVER BENEFITS FOR ALL COMMUNITY MEMBERS

- **Property Manager:** Provides easy access to information & open action items to streamline & organize workflow.
- **Portfolio Manager:** Provides information by portfolio to be able to quickly identify & address areas that require management attention.
- **Management Company:** Streamlines new team member onboarding process by providing system and information continuity.
- **Board Association:** Tasks can be assigned to Board members along with relevant information allowing them to quickly & efficiently address needs. Plus, detailed activity reporting is readily available to handle Board inquiries.
- **Homeowner:** Maintenance requests can be easily routed to assigned vendors, simplifying & expediting the work order process for homeowners.