

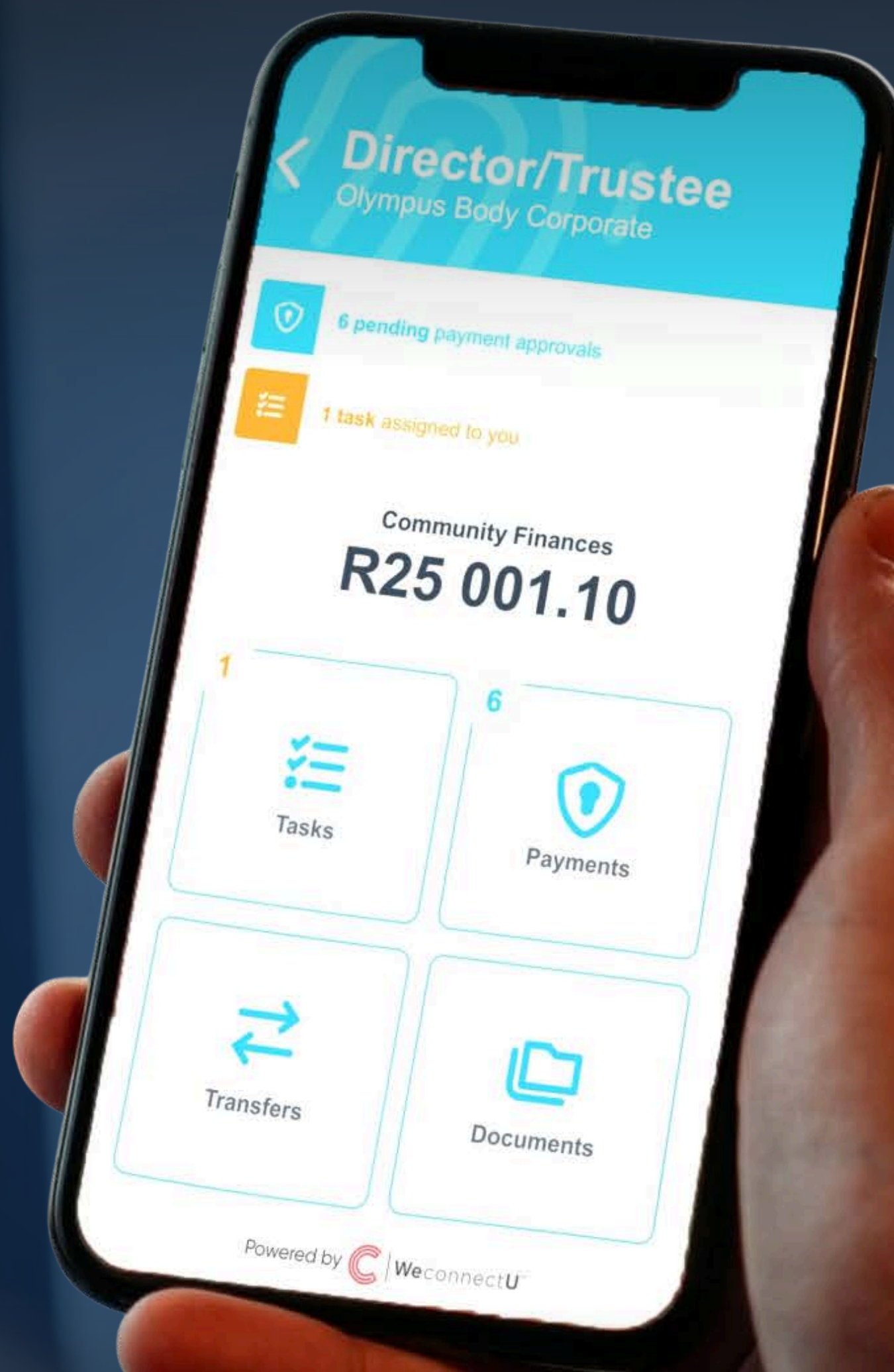
Introducing **The Community App** For Trustees and Directors



Community Management
In The Palm of Your Hand

Introducing the Community App

Trustee Collaboration. Simplified.



Trustee & Director Communication, *Solved.*

- ✘ High volumes across fragmented channels
- ✘ Slow decision and instruction cycles
- ✘ Constant follow-ups required

POSITIONING

The story you tell, the language you use, will determine the way the Trustee or Directors feel when they hear about the Community App Launch.

Create the right feeling:

What does this mean practically:

What will Trustees answer if someone asks them: "Why is the managing agent launching this App?"

Will they say - to make something in their world easier - **it's for them!**

OR

Will they say - that the reason is to make the collaboration **easier for me?**

Make the benefits real & tangible:

- Designed for their reality
- Give clarity/transparency
- Act/Decide with confidence
- Complex tasks simplified

Language to use:

- ✓ **More control**
The App offers the easiest way to stay in control
- ✓ **More clarity**
A clearer way to see what's happening with tasks/payments
- ✓ **More visibility**
Less stress and pressure
- ✓ **Make more confident decisions**
A simpler way to approve payments in real time
- ✓ **Only react when needed**
Notifications mean fewer emails to check and deal with

The Goal:

- Make **them feel**: This helps me fulfil my role and empowers me to be a better Trustee
- Make **yourself feel**: We're helping Trustees to carry out their responsibilities with clarity and confidence!

Language NOT to use:

- ✗ App as your USP (*Unique Selling Point*)
- ✗ Creates extra effort and work
- ✗ A new "system" to learn
- ✗ A new process we're implementing
- ✗ Another optional alternative or nice-to-have

The Goal: Positioning Statement

"COMMUNITY MANAGEMENT IN THE PALM OF YOUR HANDS"

STRATEGY

The App can be an opportunity to amend rules of engagement and create new ways of working – and to move the needle in how the trustees see your value (Value redefinition)

Step 1: Define Success First

SUCCESS of the Community App for trustees and directors will be **90% positioning and behaviour change** (*internally and Trustees/Directors*) and 10% the functionality of the product / App.

Making sure that your team is aligned and understands what will be deemed successful will ensure that the required effort is continuously put in until that defined success is achieved. If this picture is not clear, team members might say "but I did tell the trustees about the App", and no behaviour change or adoption might be achieved.



Success Metrics

- % of schemes using the app for payment approvals
- Reduction in email-based approvals
- Schemes giving instructions through the app only
- Reduction in follow-up calls and emails
- An Increase in decision-making speed

Step 2: Controlled environment increases the probability of success

Rolling out the Trustee App is not just a product launch – **it is a behaviour change**. And behaviour does not change through awareness alone. Too often, new tools are introduced through mass emails or passive communication, with the hope that adoption will follow. In reality, this approach creates noise, not impact.

If we want real adoption – where trustees actively use the app and teams experience the benefit – we need to be intentional. A controlled, high-quality rollout increases the probability of success by focusing on when we roll out, who we start with, and how we introduce the experience. It allows us to build confidence, prove value, and establish new ways of working before scaling across the full portfolio.

Controlled is:

- ✓ **When** to rollout
- ✓ **Who** to rollout to first
- ✓ **How** to rollout (*E.g. In-Person Trustee Meetings*)

Uncontrolled is:

- ✗ **Mass** email rollout
- ✗ **Passive Awareness** Campaigns
- ✗ **Hoping** for adoption

Rollout Principle:

A controlled, high-quality rollout before you scale



STRATEGY

Step 3: Choose the right Communities

Choosing where to start is critical to the success of your rollout. By selecting a small portion of your portfolio, communities with strong managers, engaged trustees, and positive client sentiment – you create the ideal environment to demonstrate value, refine your approach, and set the standard before scaling further.

Example: Success Metrics

- 5–10% of your portfolio
- Strong Community Managers (PM's)
- Reasonable/ Friendly Trustees
- High client-sentiment communities first
- Target upcoming Trustee Meetings

The Goal:

Is not to launch everywhere, but to create early wins that build momentum and confidence.

Step 4: Determine the best approach for impact

How you introduce the app will determine whether it gets used or ignored. The most effective approach is a **high-energy, face-to-face rollout** – ideally in a trustee meeting – where you can guide adoption in real time.

By getting trustees to download the app, demonstrating simple, practical workflows, and answering questions on the spot, you turn awareness into action and set the foundation for immediate use.

Find out what works to build confidence, then create momentum!

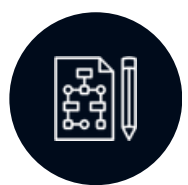
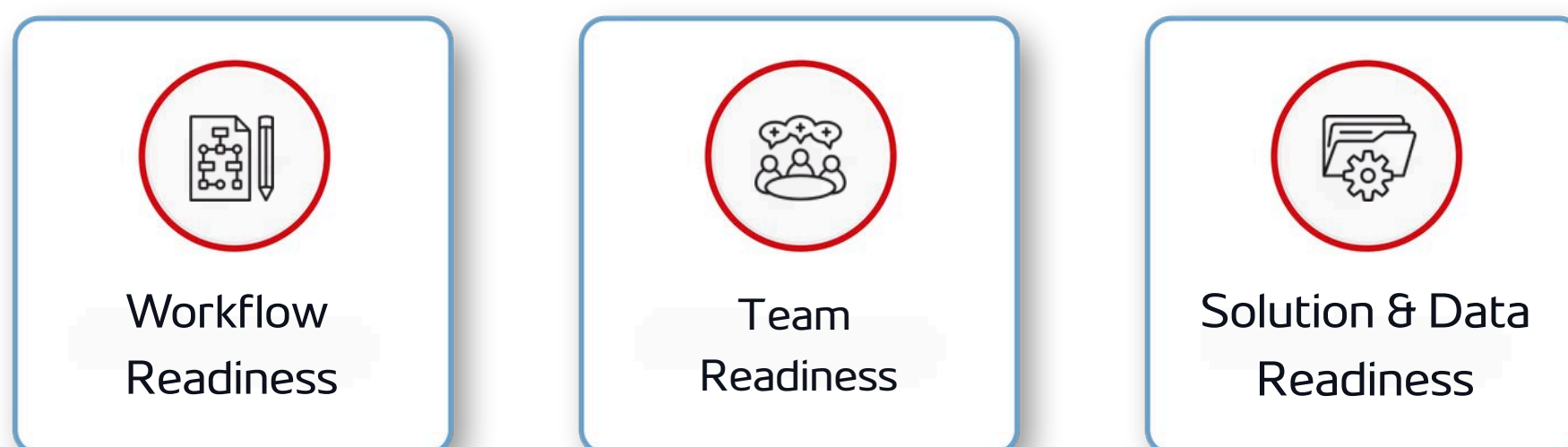


PRACTICAL ROLL OUT

PHASE ONE

Internal Readiness

A successful rollout starts long before trustees ever see the app. Phase 1 is about internal **readiness checks** – ensuring your processes, data, and team are aligned and consistent. The reality is simple: the app will expose the quality of your internal workflows. If the foundation is strong, the experience builds trust and confidence. If not, it creates friction. Getting this right is what sets the stage for a successful launch.



Workflow Readiness

- Review payments workflow to ensure “Rock-solid” (Link to level up workshop 1 workbook)
- Internal collaboration way of working – how do we ensure that tasks logged gets answered?



Team Readiness

- Understand, follow and are able to explain workflows clearly to the trustees
- Be fully trained on the app – not just functionality, but how it fits into the workflow
- Understand the “why” behind the change and confidently communicate it to trustees
- Operate as professional advisors, not administrators, leading the process, not reacting to it
- Anticipate and confidently handle common questions and objections
- Provide immediate support in the moment – not “we’ll get back to you”
- Be able to guide trustees step-by-step during onboarding (no uncertainty)
- Training on the APP, be able to guide users
- Google Play Store & Apple App Store download process
- Password resetting knowledge



Solution and Data Readiness

- Check the Trustee Payment Authorisation set up
- Review documents (uploads and file names)
- Check Trustee permissions

The Goal:

Your team should walk into the rollout, knowing exactly what to do, how to do it, and how to support trustees with confidence and clarity.

PRACTICAL ROLL OUT

PHASE TWO

Pilot rollout and activation

A successful pilot rollout and activation is where preparation meets real-world use. This phase is about introducing the app to a controlled group, validating assumptions, and ensuring everything works as intended in a live environment. It's not just about switching the system on; it's about observing how users engage, identifying gaps, and refining the experience before a full-scale launch. The reality is simple: your pilot will reveal how well your setup translates into practice.

Rollout Principle:

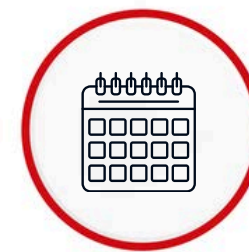
Create proof and Confidence



Pre-meeting
Preparation



Handholding
Activation



First 30-days
Discipline



Pre meeting preparation

- Position it clearly in communication leading up to the meeting:
- This is about improving decision-making and reducing delays
- This is not adding work – it's simplifying the process

Make it a deliberate point of discussion

Adoption starts before the meeting even begins. Set the expectation that this is not an optional extra, but an important step in improving how the scheme operates.

Add a dedicated item to the meeting agenda:

"Activation of the Improved Payment & Instruction Process"

PRACTICAL ROLL OUT



Example:

Dear Trustees,

As part of our ongoing commitment to improving the efficiency and governance of the scheme, we are very excited to share that we will be introducing an important enhancement to how payment approvals and instructions are managed.

We have added a dedicated item to the upcoming meeting agenda:
"Activation of the Improved Payment & Instruction Process"

This discussion will focus on a more streamlined and structured approach to approvals – designed to improve decision-making, reduce delays, and provide clearer visibility on all supporting information. Importantly, this is not about adding additional work, but rather about simplifying the process and reducing the need for follow-ups, emails, and fragmented communication.

We will guide you through this during the meeting and ensure that everything is set up in a clear and practical way. We look forward to taking you through this improvement together.

Kind regards,
[Your Name]
[Your Company Name]

Preparation before the meeting

- Agenda item confirmed
- Permission & User Setup
- Login Guide
- Demo Setup
- Get resources ready

Resource:

Download the full checklist Tool for your pre-meeting checks, complete this before each meeting.

[Download Here](#)



PRACTICAL ROLL OUT



Handholding Activation

In the meeting, make use of the 5 points:

1. Set the Context - *create comfort & clarity*
2. Introduction & Getting Started
3. Live Demonstration - *make it real*
4. *Establish the Ways of Working going forward*
5. *Anchor the Behaviour Change*

The Goal: Not to explain the app,
It is to create action in the room

1. Set the Context - *create comfort & clarity*

Start by showing, not telling.

- Watch the Trustee Introduction Video together
- Position the app as:
 - A simpler way to manage approvals
 - A way to reduce emails and follow-ups

2. Introduction & Getting Started

Briefly introduce the app (*keep it simple – no overload*)

- Assist trustees with:
- Downloading the app
- Logging in
- Resetting passwords if needed

3. Live Demonstration - *make it relatable*

Show real, relevant examples:

- A live pending payment
- Where supporting documents are visible
- How the approval process works
- Where task/progress visibility sits

Then:

- Approve a sample payment live
- Behaviour changes when action happens in the room.

The Goal: The goal here is to reduce
any tech anxiety immediately

PRACTICAL ROLL OUT

4. Establish the Way of Working - going forward

Be clear and confident:

"To ensure we get the full benefit of this improved process, I will act as the accountability partner to support you in using the app going forward."

Reinforce consistently:

- "Thanks – please approve this in the app so we keep the audit trail."
- Redirect any email approvals back to the app

5. Anchor the Behaviour Change

- Consistency is key
- No parallel processes (email vs app)
- Gently correct and guide when needed

Rollout Principle:

Behaviour change does not happen through introduction – it happens through consistent reinforcement

This is not a demo session.

It is a behaviour change session.

If the trustees leave having taken action > **Adoption starts immediately**

If the trustees leave without taking action, it becomes **"something we'll get to later"**

How do you position everything said to the trustee? What is the cause and effect of how I position not only the app but myself?

- Have a clear goal and intention
- Have a goal for the conversation and a strategic conversation

PRACTICAL ROLL OUT



Example Script:

GOAL:

**Confident Introduction,
Getting Started & Way of
Working**

STRATEGY

"Before we get into anything technical – I just want to reassure you: This is not a complicated system, and we're going to go **through it together step by step.**"

"The purpose of this app is very simple – to make approvals easier, clearer, and to reduce the back-and-forth emails."

"You'll only be notified when something needs your attention, and when you open it, everything you need to make a decision will be there."

Set the tone explicitly

"The goal for the next few minutes is simply to get everyone comfortable – **there's no pressure, and we'll do everything together.**"

Transition into action

"Let's get you set up – this will only take a few minutes."

"If you can, please take out your phones, and we'll download the app together. **I'll guide you through logging in** – and if anything doesn't work, we'll fix it right here."

While assisting

"If you've forgotten your password, no problem – we'll reset it now. Take your time – **I'm here to help each of you get in.**"

Reassurance during the process

"There's no expectation to figure this out on your own – **my role here is to support you** and make this as easy as possible."

"This is really just about removing friction, not adding anything complicated."

Close onboarding and transition to usage

"Great – once everyone is in, **I'll show you exactly how this works** using a real example, so you can see how simple it is in practice."

After Demo – Establish Way of Working

"To ensure that we **get the full benefit** of this improved way of working, I will act as your accountability partner in this process. What that means in practice is that we'll start using the app as our primary way of handling approvals and instructions."

"So if something comes through on email, I'll gently guide us back to the app just to make sure we keep everything structured and in one place."

Set expectation clearly and simply

"For example, I might say: 'Thank you, **please approve this in the app** so we keep the audit trail.'"

Anchor the behaviour change

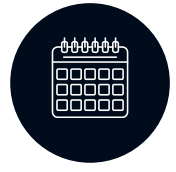
"**This only works if we're consistent.**"

That's what will reduce the back-and-forth, speed up decisions, and give you full visibility."

Closing Line

"We'll take this step by step, and I'll support you along the way – But by **using the app consistently, we'll very quickly start to feel the difference.**"

PRACTICAL ROLL OUT



First 30-day Discipline

Post meeting, foolproof steps:

1. Next Day Email
2. Get Action (*First 7 Days*)
3. Keep the Line
4. *Track Success*

The Goal:

Confirm and embed the new way of working



1. Next Day Email - Reinforce immediately

Send a confirmation email the morning after the meeting:

- Reconfirm the new way of working
- Position the app as the primary channel for approvals
- Provide supporting tools:
 - Trustee Introduction Video
 - Trustee PDF One-Pager
 - Trustee How-To Guide

The Goal:

Remove any uncertainty and keep momentum.



PRACTICAL ROLL OUT



Example Email:

Dear Trustees,

Thank you for your time in the meeting yesterday and for engaging in the activation of our improved payment and instruction process.

As discussed, we will now be moving to the app as our primary channel for approvals and instructions. This will ensure that all decisions are made with full visibility, supporting documentation, and a clear audit trail – while reducing the need for emails and follow-ups.

To support you in this transition, we've included the following resources:

- Our payments workflow – a quick view of when you can expect what from our side*
- Trustee Introduction Video – a quick overview of the app and its purpose*
- Trustee One-Pager – a simple summary of how this improves your role*
- Trustee How-To Guide – step-by-step guidance for using the app*

[Insert Links to Resources]

We encourage you to continue using the app for all approvals going forward. If anything is unclear or you need assistance, please don't hesitate to reach out – we are here to support you.

Looking forward to working together in this more streamlined and efficient way.

Kind regards,

[Your Name]

[Your Company Name]

PRACTICAL ROLL OUT

2. Get Action (First 7 Days) - Drive immediate usage

The first action is the most important – it builds confidence.

- Ensure at least one real approval happens via the app
- Prompt trustees when action is required
- Support them through their first real interaction

3. Keep the Line - Protect the new way of working

Behaviour change requires consistency – not exceptions.

- Do not allow fallback to email approvals
- Gently redirect: *"Thanks – please approve this in the app so we keep the audit trail."*
- Stay consistent, even when it feels easier to revert

4. Track Success - Be intentional and proactive

Track weekly:

- Who has logged in?
- Who has approved?
- Who is not engaging?

Then:

- Follow up individually
- Offer support where needed
- Do not shame publicly

Rollout Principle: *The first 30 days determine everything.*

- Reinforce immediately
- Drive early action
- Stay consistent
- Track and support

 **If you follow** – The new behaviour sticks.

 **If you don't follow** – It quietly falls back to email

PRACTICAL ROLL OUT

PHASE THREE

Scaled Rollout

A successful scaled rollout is about expanding with control, not just speed. This phase focuses on taking what worked in the pilot and rolling it out across your full portfolio in a structured, repeatable way. Scaling amplifies everything. Strong processes become efficient and impactful at scale, while any gaps or inconsistencies quickly multiply.

Rollout Principle:

Activating at scale is not a default next step; it's a decision based on:



Success of your
Pilot



Feedback
Received



Evidence of
behaviour change

By this stage you have:

- Proven that the app works
- Built internal team confidence
- Created real examples of success with trustees

Approach to Scaling

- Roll out in **structured waves** (not all at once)
- Use **pilot success stories** to build trust with new communities
- Equip teams with **real examples and confidence**, not theory
- Maintain the same quality of rollout – even as you scale

The Goal: Momentum is built through proof. Credibility is built through consistency.

Rollout Principle: When you scale from a place of confidence

- Adoption accelerates
- Resistance decreases
- The new way of working becomes the standard – not the exception

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Community Management

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