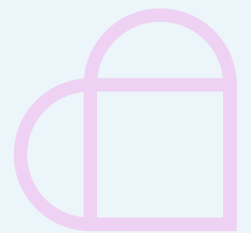




# Switching Platforms

**Your Complete Change Management  
Guide for Modern Property Management**

A step-by-step roadmap for real estate businesses ready to upgrade their property management platform with minimal disruption day-to-day operations



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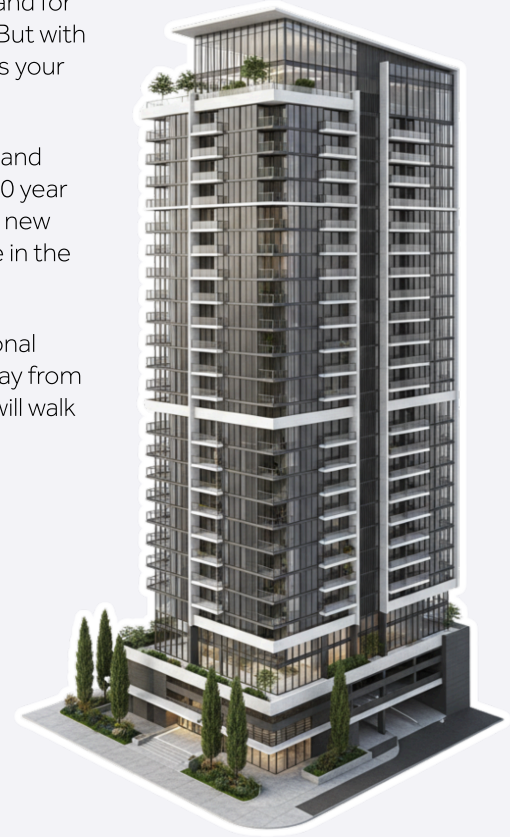
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## Introduction

The decision to switch property management platforms is often met with hesitation, and for good reason. The risks feel high: downtime, staff resistance, and business disruption. But with the right planning and a structured approach, it can be one of the most valuable moves your business makes.

Don't let the fear of short-term disruption be the reason for sticking with an outdated and inefficient platform. Choosing a new property management platform is realistically a 10 year decision. That's 520 weeks. The disruption of migrating, onboarding and embedding a new platform is about 5-6 weeks. That 1% of the lifetime of your platform. Not a lot of time in the big scheme of things.

This whitepaper is designed to help business owners, department heads, and operational leaders navigate this transition with clarity and confidence. Whether you're moving away from legacy software or consolidating tools into a modern platform like Kolmeo, this guide will walk you through both the practical and psychological components of successful change management.



### Strategy before software

Before selecting a new platform or setting a go-live date, align your leadership team on the business reasons for change.

#### Define the Why

- ◆ Are you aiming to scale without adding headcount?
- ◆ Do you need better visibility across multi-office operations?
- ◆ Is manual trust accounting and disconnected systems slowing down your team?

#### Set Success Criteria

- ◆ What outcomes will define success in 3, 6, and 12 months?
- ◆ Think in terms of metrics: properties per manager, admin hours saved, owner/tenant satisfaction.

#### Evaluate Platform Fit

Choose a solution that aligns with your growth goals. For example, if you're planning significant rent roll growth and/or opening more offices, ensure you have a platform that will support efficiency at scale and enable access and reporting from a single log in. Kolmeo supports multiple brands, offices, and payment workflows in one platform, critical for agencies wanting to scale.

## Building your change team

Change doesn't stick without the right people championing it.

### Key Roles to Appoint:

#### Project Lead:

Oversees the migration, manages timelines, and is the central point of contact

#### Executive Sponsor:

C-level or business owner who reinforces vision and clears internal roadblocks

#### Department Champions:

Experienced team members from property management, finance, and administration to advocate for change and raise risks early

### Identify Change Champions and Super Users:

- ◆ Look for individuals who are influential, curious, and solutions-focused - regardless of seniority
- ◆ Champions should be early adopters who model the new way of working
- ◆ Super users can provide hands-on support during and after go-live, offering peer-to-peer coaching and reinforcing best practices

### Establish a Clear Governance Model:

- ◆ Weekly steering meetings
- ◆ Shared project plans
- ◆ Success metrics ownership

## Communication and engagement

If your team doesn't understand what's changing, why it matters, and how it affects them, expect resistance.

### Create a Communication Plan:

- ◆ Announce the change early and explain the why
- ◆ Provide a roadmap so everyone knows what's coming
- ◆ Repeat messages often through different channels (email, meetings, 1:1s)

### Address Emotional Responses:

- ◆ Change brings anxiety. Acknowledge this, and give people room to adapt.
- ◆ Offer support - not just instructions.

### WIIFM (What's In It For Me) for Each Role:

- ◆ For Property Managers: Fewer admin tasks, better visibility
- ◆ For Trust Accountants: Automation and simplicity
- ◆ For Admin Teams: Less duplication, better data control

## Migration in practice

Avoid the "big bang" approach. Phased implementation allows you to learn and refine before scaling.

### Data Preparation:

- ◆ Clean data before migration to reduce downstream errors
- ◆ Identify duplicates, outdated contacts, and incomplete profiles

### Portfolio-by-Portfolio Rollout:

- ◆ Start with a single office or portfolio to test systems and workflows
- ◆ Use early results to guide broader implementation

### Stakeholder Onboarding:

- ◆ Owners and tenants need proactive, clear communication
- ◆ Use templated emails and FAQ guides
- ◆ Explain what's changing, how it affects them, and what action (if any) they need to take

## Training that sticks

Training should empower users, not overwhelm them.

### Tailor by Role:

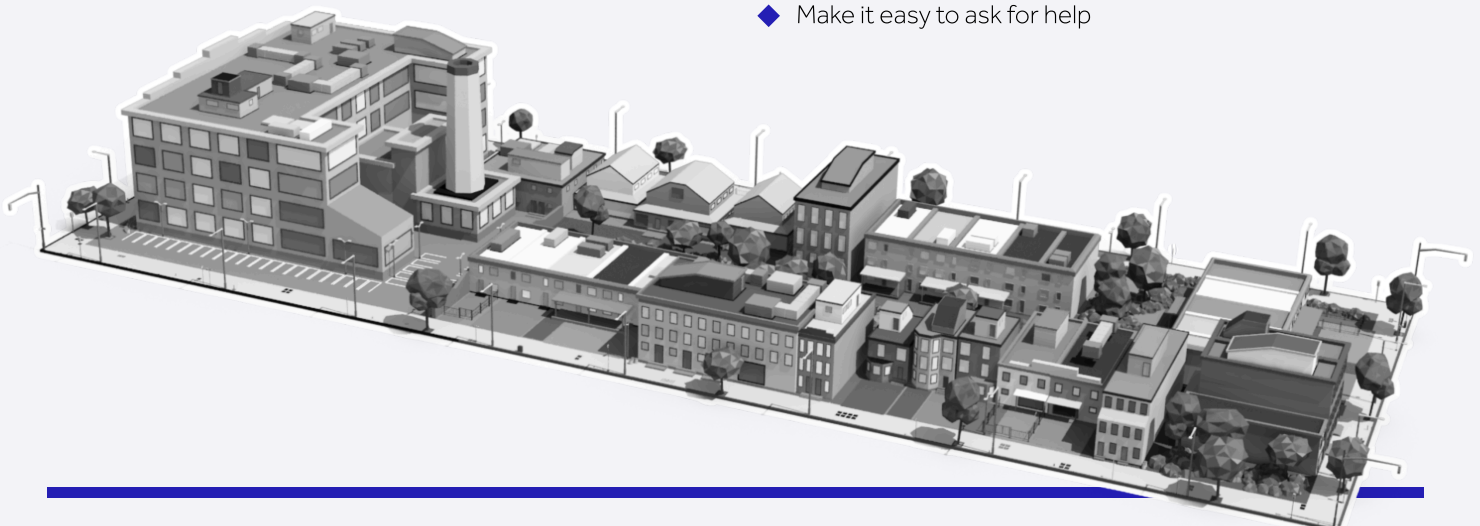
- ◆ Trust accountants need a deep dive into payment and reconciliation workflows
- ◆ Property managers want to know how inspections, maintenance, and communication work in the new system

### Deliver in Multiple Formats:

- ◆ Live walkthroughs, recorded videos, quick-reference guides

### Support On the Job:

- ◆ Schedule floorwalking sessions or daily check-ins during go-live week
- ◆ Make it easy to ask for help



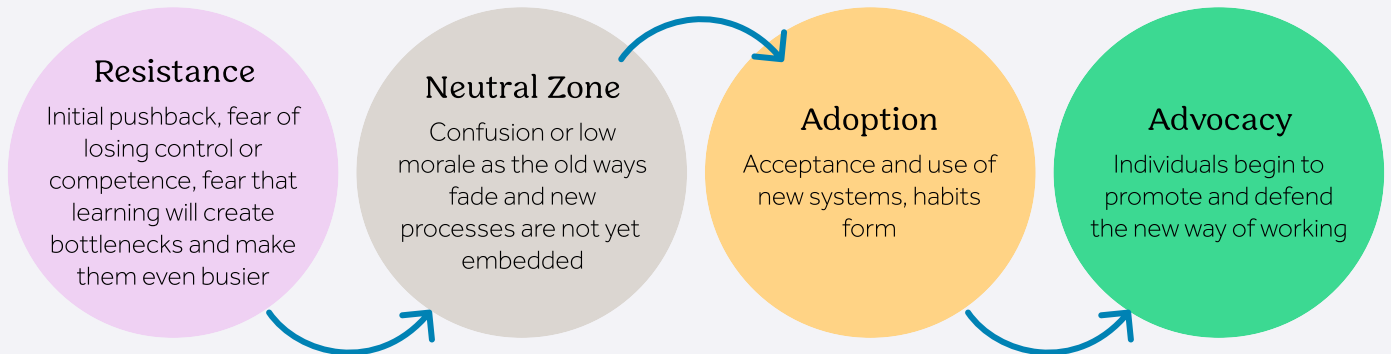
## Managing the psychology of change

Tech migrations are as much about mindset as mechanics.

### Recognise Change Fatigue:

Property management teams often juggle high workloads. Empathy is essential.

### Understand the Phases of Change:



### Move Users Through the Curve:

- ◆ Acknowledge resistance without judgment
- ◆ Provide stability and structure in the neutral zone
- ◆ Empower staff by involving them in solution-building
- ◆ Highlight small wins to build confidence and momentum

### Celebrate Early Wins:

Highlight successful migrations, reduced admin time, or positive client feedback

### Create Feedback Loops:

Weekly team retros to gather insights and surface pain points

## Post-go live: embed & optimise

Your new platform should evolve with your business.

### Track Metrics:

- ◆ Are you achieving what you set out to?
- ◆ Monitor property-to-staff ratios, arrears, and tenant/landlord NPS scores

### Gather Feedback:

Use surveys or interviews to understand user experience

### Continual Training:




- ◆ Offer refreshers and advanced sessions for power users
- ◆ Super users should become embedded mentors within each team or office

# Checklist: Your platform transition action plan







Use this high-level checklist to keep your project on track from decision to post-go live.




## 1 Strategy & Preparation:

-  Define the core business reasons for switching platforms
-  Identify key success criteria and measurable goals
-  Evaluate platform features against current and future needs




## 2 Change Team & Governance:

-  Appoint a Project Lead
-  Assign an Executive Sponsor
-  Identify Change Champions and Super Users
-  Set up regular steering meetings and project documentation




### 3 Communication & Engagement:

-  Create and share a change communication plan
-  Tailor WIIFM messaging for each role group
-  Schedule Q&A sessions with all staff





### 4 Migration Planning:

-  Clean and prepare all data prior to migration
-  Define phased rollout strategy (e.g. by office or portfolio)
-  Develop onboarding messages for owners and tenants




### 5 Training & Enablement:

-  Deliver role-based training (Property Managers, Trust Accountants, Admins)
-  Create job aids, videos, and quick-reference guides
-  Provide in-person support during go-live week

### 6 Change Psychology & Support:

-  Acknowledge and normalise change resistance
-  Support staff through the neutral zone with structure and clarity
-  Celebrate small wins and early adoption milestones
-  Conduct regular feedback loops to resolve concerns

### 7 Post Go-Live Optimisation:

-  Monitor adoption and key performance metrics
-  Schedule refresher training and advanced sessions
-  Empower Super Users to lead ongoing knowledge sharing



## Conclusion

Change doesn't have to be painful. With the right planning, communication, and support, transitioning to a modern platform like Kolmeo can be one of the best decisions your business makes.

You'll not only improve operations today - you'll position your agency for scalable, futureproof growth tomorrow.

To learn more about Kolmeo and how we support successful transitions, visit [www.kolmeo.com](http://www.kolmeo.com) or [contact our team](#).



Kolmeo empowers driven property leaders with a scalable, secure, and future-ready platform designed to unlock growth, reduce risk, and maximise profitability.

Built specifically for residential property professionals, Kolmeo's highly configurable solution enables property managers to seamlessly manage their entire rental portfolios: from lease agreements and maintenance to payments and beyond.

With Kolmeo Plus, agencies unlock a fully managed digital marketplace that generates new revenue streams automatically by connecting tenants and owners with high-demand services including utilities, removals, insurance, and lending - all with zero additional workload for your team.

Born in Australia and engineered for the long term, Kolmeo is redefining property management for high-performing agencies, owners, and tenants who expect more.

[kolmeo.com](https://kolmeo.com)

