

Business case toolkit guide

What's in the kit, who each document is for, and how to use it.



Why you need this guide

Not every document will be right for every situation, so use the guide below to pick the right tool at the right moment. Each one is built to help you build the case for change inside your own agency, and the earlier you start, the easier the decision tends to be.

DOCUMENT	BEST FOR	WHEN IT HELPS	HOW TO USE IT
<u>Agency readiness checklist</u>	Anyone wanting a quick, honest read on where their agency stands.	Early on, to gauge how much there is to gain.	Work through it as a team. The areas you score highest are where Goodlord would make the biggest difference.
<u>Business case builder</u>	Anyone preparing to put the case to an owner, finance lead, or board.	At the start, before your first internal conversation about investing.	Map out who needs convincing and frame the investment in the terms each decision-maker cares about.
<u>ROI calculator</u>	You, alongside whoever owns the budget.	Once you have a rough idea of your tenancy volume and team size.	Enter your own numbers to generate a one-page financial summary built on your agency's reality.
<u>Cost of inaction</u>	Finance leads, owners, and budget holders weighing up whether to act now.	When a decision is being deferred, or the honest answer is "not yet".	A risk exercise; the admin, compliance, and hidden costs are there to help you weigh what standing still actually costs.
<u>Cost of one missed step</u>	Owners and operations leads who need to see what a single compliance slip could actually cost.	Owners and operations leads who need to see what a single compliance slip could actually cost.	When compliance or risk is the real hesitation, or the worry is "what happens if we get one step wrong".

DOCUMENT	BEST FOR	WHEN IT HELPS	HOW TO USE IT
Stakeholder FAQs	Any colleague with questions, from admin staff to directors.	Once questions start coming in from around the business.	It answers the most common technical, commercial, and operational questions so your team can reach a decision without delay.
What to expect: your first 90 days	Operations and admin teams, and anyone worried about disruption.	When the concern is how much upheaval the change will cause.	Get a clear, realistic timeline is often what settles nerves and moves things forward.
Platform comparison	Anyone actively comparing tenancy management platforms.	When you are weighing Goodlord against other options.	Use it to compare on depth and integration, not price alone. A connected, end-to-end platform behaves very differently day to day from a collection of separate tools.

A suggested order

There is no single right way through the kit, but this sequence works well for most agencies:

1. Run through the [Agency readiness checklist](#) to see where your agency stands and where the biggest gains are.
2. Work through the [Business case builder](#), then use the [ROI calculator](#) to put your own numbers behind it.
3. If you're not sure it's the right time, the [Cost of inaction](#) and the [Cost of one missed step](#) will help you weigh up the cost of waiting.
4. For any concerns, the [Stakeholder FAQs](#) and [First 90 days guide](#) address questions about disruption and day-to-day use.
5. If you're comparing options, use the [Platform comparison](#) to weigh Goodlord against the alternatives.

Platform comparison



Platform

● Included

● Not documented

● Via third-party

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Vision +

Barbon Group

Rightmove

Propoly

Lettings Hub

Blinc

Pink Chilli

Tenancy set up features

CRM integrations	●	●	●	●	●	●	●	●
Add/Import landlord, applicant and property	●	●	●	●	●	●	●	●
Compliant tenancy typer: AT / AST / Licence / Non AST	●	●	●	●	●	●	●	●
Landlord Terms of Business: Create, send and design	●	●	●	●	●	●	●	●
Landlord AML checks	●	●	●	●	●	●	●	●
Tenant pre qualification	●	●	●	●	●	●	●	●
Property licence checks	●	●	●	●	●	●	●	●
Statutory document handling	●	●	●	●	●	●	●	●
Contract generation	●	●	●	●	●	●	●	●
Contract signing / e-signing	●	●	●	●	●	●	●	●
Custom contracts	●	●	●	●	●	●	●	●
Custom clauses	●	●	●	●	●	●	●	●
Offer management, incl. letter generation	●	●	●	●	●	●	●	●
Prescribed information	●	●	●	●	●	●	●	●
How to Rent guide handling	●	●	●	●	●	●	●	●
PEPs and sanctions checks	●	●	●	●	●	●	●	●
Compliant for England, Scotland and Wales	●	●	●	●	●	●	●	●

Payment management

Move-in monies collection and reconciliation	●	●	●	●	●	●	●	●
Rent & payment collection incl reminders and chasers	●	●	●	●	●	●	●	●
Deposit protection	●	●	●	●	●	●	●	●
Holding deposits via debit and credit card, and OB	●	●	●	●	●	●	●	●

Tenancy management

Check-in inventory	●	●	●	●	●	●	●	●
Section 13 Notices	●	●	●	●	●	●	●	●
Property Certificate Dashboard	●	●	●	●	●	●	●	●
Ability to add external tenancies	●	●	●	●	●	●	●	●
Agent-branded landlord and tenant communications	●	●	●	●	●	●	●	●

Rent review management	●	●	●	●	●	●	●	●
Legislative Automation (RRA 2025)	●	●	●	●	●	●	●	●

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Value-add services

Landlord B&C insurance	●	●	●	●	●	●	●	●
TCLI	●	●	●	●	●	●	●	●
Utility Management Services	●	●	●	●	●	●	●	●
Relocation and removal services	●	●	●	●	●	●	●	●
Broadband and media	●	●	●	●	●	●	●	●
Void period management	●	●	●	●	●	●	●	●
Bill management	●	●	●	●	●	●	●	●

Referencing ● Included ● Not documented ● Via third-party

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Features

AML checks	●	●	●	●	●	●	●	●
PEPs and sanctions checks	●	●	●	●	●	●	●	●
Professional guarantor	●	●	●	●	●	●	●	●
Rent share	●	●	●	●	●	●	●	●
Credit check	●	●	●	●	●	●	●	●
Instant identity document authentication	●	●	●	●	●	●	●	●
Right to Rent documentation collection	●	●	●	●	●	●	●	●
Professional referencing reports	●	●	●	●	●	●	●	●
Share referencing reports with landlords	●	●	●	●	●	●	●	●
Residential checks	●	●	●	●	●	●	●	●
Income checks (Open Banking)	●	●	●	●	●	●	●	●
Income checks (HMRC & payroll providers)	●	●	●	●	●	●	●	●
Proactive contact from day one	●	●	?	●	●	●	●	●
Referencing decisions	●	●	●	●	●	●	●	●
Fraud and risk screening	●	●	●	●	●	●	●	●
IDVT integration	●	●	●	●	●	●	●	●
Fully insurable	●	●	●	●	●	●	●	●

Insurance ● Included ● Not documented ● Via third-party

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Features

Integrated RPI offering	●	●	●	●	●	●	●	●
Landlord opt-in during journey	●	●	●	●	●	●	●	●

Features

Back-book cover (policy dependent)	●	●	●	●	●	●	●	●
Automated claims process	●	●	●	●	●	●	●	●
Standardised policy terms	●	●	●	●	●	●	●	●
Legal expenses cover	●	●	●	●	●	●	●	●
Void period management	●	●	●	●	●	●	●	●
Alternative accommodation cover	●	●	●	●	●	●	●	●
Sales enablement and policy support	●	●	●	●	●	●	●	●
First month's rent guaranteed if unpaid	●	●	●	●	●	●	●	●
Section 13 protection	●	●	●	●	●	●	●	●
£1,000 property damage cover	●	●	●	●	●	●	●	●
Alternative landlord accommodation cover	●	●	●	●	●	●	●	●
Storage cover	●	●	●	●	●	●	●	●
£100,000 legal cover	●	●	●	●	●	●	●	●
100% rent paid until vacant possession	●	●	●	●	●	●	●	●
90% rent post-vacant possession	●	●	●	●	●	●	●	●
Rent recovery service (includes eviction of tenants or squatters)	●	●	●	●	●	●	●	●
Rent Guarantee and legal cover	●	●	●	●	●	●	●	●

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Goodlord stands up to the comparison. The rest of the Business Case Toolkit makes your case:

- **Agency readiness checklist** - assess where you stand and pinpoint your starting point.
- **Business case builder** - build your internal case from first pitch to handling every objection.
- **ROI calculator** - enter your agency's numbers and generate a one-page financial summary to share.
- **Cost of inaction** - show your decision-maker what staying on manual processes costs you every year.
- **Cost of a missed step** - see how one compliance slip becomes a five-figure problem, and how to prevent it.
- **What to expect: your first 90 days** - know exactly what implementation looks like before anyone raises it.
- **Stakeholder FAQs** - get ready-made answers to the questions your decision-makers will ask.

[Speak to the team](#)