

# MoveIT

Refer. Complete. Paid. Repeat.



# What is MoveIT?

MoveIT is a **highly efficient** digital platform designed to manage and streamline all moving referrals from estate agencies.

It connects directly to an estate agent's software system through bespoke designed APIs and can track **all key milestones** in a client's property journey, like new instructions, sales agreed, abortive sales including fees, resales, exchanges, and completions.

Thanks to this data integration, MoveIT can also **automate the entire lifecycle** of a moving referral – from quote through to billing and payment – **without requiring any manual intervention.**



# A simple, complete workflow

At its core, MoveIT keeps the moving process simple:



**Quote**



**Instruct**



**Paid**



**Repeat**

It also takes care of everything in between.

It's completely automated, transparent, and built for scale.

# A moving proposition that helps agents win instructions

**In today's market, vendors don't just choose an agent – they choose confidence.**

MoveIT helps estate agents win more listings by enabling them to present a genuine, end-to-end moving solution at the point it matters most: the valuation.

**Why does this matter at instruction stage?**

Most agents offer similar marketing, portals, and promises.

**MoveIT changes the conversation. Instead of selling just an instruction, agents using MoveIT offer:**

- A fully coordinated moving journey
- Clear next steps from day one
- A professional, organised approach to the entire transaction

**This reassures vendors, builds trust faster, and improves appraisal-to-instruction conversion.**



# Automation is key

**MoveIT continuously monitors all milestones in the property journey – even the potential loss of income from abortive sales.**

In the UK, up to 30% of sales fall through. Often, these buyers move on to buy elsewhere but still use their previously referred suppliers.

In this instance, MoveIT applies a structured set of rules to identify, manage, and retain the referrals instead of losing the opportunity. The unique programme tracks these instructions that would otherwise be lost and protects any loss of income through timely alerts in the task management area.



To replace a typically admin-heavy process, MoveIT also automatically chases any referral or supplier action that has surpassed its expected timeline or has no update recorded.

**This ensures no referral is forgotten or stalled and all suppliers stay accountable.**

# Zero manual input required

MoveIT manages the complete moving process, from beginning to end:



**Refer. Complete. Paid. Repeat.**

- **Quote creation**
- Referral tracking
- Supplier notifications
- Status updates
- Chasing and progress monitoring
- Completion confirmation
- Billing
- Payments
- **Revenue distribution** (including automated deductions for software partner/MoveIT)

For estate agents, this makes the process totally hands-free - the MoveIT system handles everything via rules, timelines, and milestone triggers.



# Automated task management... even for exceptions

MoveIT has its own highly secure billing area, giving both agents and suppliers full visibility over all financial activity, including:

- Pending invoices
- Received payments
- Paid transactions
- Self-billed statements

Everything is handled through an automated monitoring process, removing almost all manual administration and significantly reducing human error.

However, it's always possible to visit the task management page and interact with these instructions, chase them, and communicate with all parties involved.

Invoices are automatically created for both suppliers and agents following any completed transaction. Agencies can also set their own internal commission structures for staff and MoveIT will automatically calculate these figures ready for payroll.

Every month, MoveIT provides a list of all completions, itemised for every supplier, agency branch, and employee.

**Everything is centralised,  
transparent, and audit ready.**



# Rule-based management of disengaged instructions

When an instruction is no longer linked to the originating agent, MoveIT automatically follows a defined set of rules to determine:



How the referral is categorised



How it should be tracked going forward



What communication or chasing actions are triggered



How revenue is allocated at the end

A timeline is then assigned to each case, and the system monitors progress in real time.

# Agent-controlled supplier management

With MoveIT, agents have **complete flexibility** when configuring their supplier marketplace, giving them full control over both service quality and revenue generation.

## Agents can:

- Select from existing panels of approved suppliers for each product category
- Invite their own preferred providers to join the system
- Create bespoke supplier lists for each branch tailored to local preferences
- Set their own referral fees for each supplier and product type

For suppliers, once they accept an invitation to join the platform, they get secure access to their own dashboard.

## Here, suppliers can:

- Set their service costs
- Define product fees
- Manage their referral workloads
- Track progress on all active referrals

This creates a **fair, transparent marketplace** where prices and terms are set collaboratively between the agent and the supplier.

# Tailored pipeline visibility

To ensure the right people see the right information, MoveIT offers structured access levels across an estate agency:

- **Negotiators** can view and manage their own pipelines
- **Branch managers** can track performance across their team
- **Agency administrators** can have oversight of billing, compliance, and progress
- **Company directors** can access a full site-wide dashboard with complete operational and revenue visibility

All of this is handled through permission-based roles, ensuring data is well protected and aligned to industry standards.



# How MoveIT improves business procurement

## MoveIT helps agents:

### **Stand out at valuation**

- By offering something competitors can't easily replicate – a true complete moving service

### **Enhance their professional profile**

- Demonstrating organisation, foresight, and control over the transaction from day one

### **Win instructions on value, not price**

- Shifting the focus away from fees and onto service, reassurance, and delivery

### **Protect stock and reduce fall-throughs**

- With better communication, earlier engagement, and fewer surprises post-offer



# A one-stop shop for property services

**MoveIT is developing to provide complete move related services including removals and utilities. Our current services include:**

- **Conveyancing** – Legally transfer a property from one person to another, using either a pre-selected panel or representatives from a national database of solicitors
- **Financial services** – Track all referrals, communicate directly with financial advisors, and manage all income across a property
- **Surveys** – Help buyers engage with a preferred surveyor
- **Energy performance certificates** – Use a pre-selected energy assessor or pick from a database of local providers to receive all required certificates efficiently
- **Offer checking** – Complete all final checks to ensure everything is in order before committing to a sale
- **Protection** – Receive guidance to ensure a resident's property and all its contents are properly safeguarded
- **Mortgage referring** – Conduct a deeper review of ongoing mortgage applications
- **Insurances** – Receive dedicated support to ensure the correct insurances are secured at the best rate
- **Remortgaging** – Specialist support for people remortgaging a property, no matter their circumstances

**Plus, all this is coming soon to the MoveIT platform...**

- Removals
- Storage
- Auto-pilot utilities
- Vendor budget planner

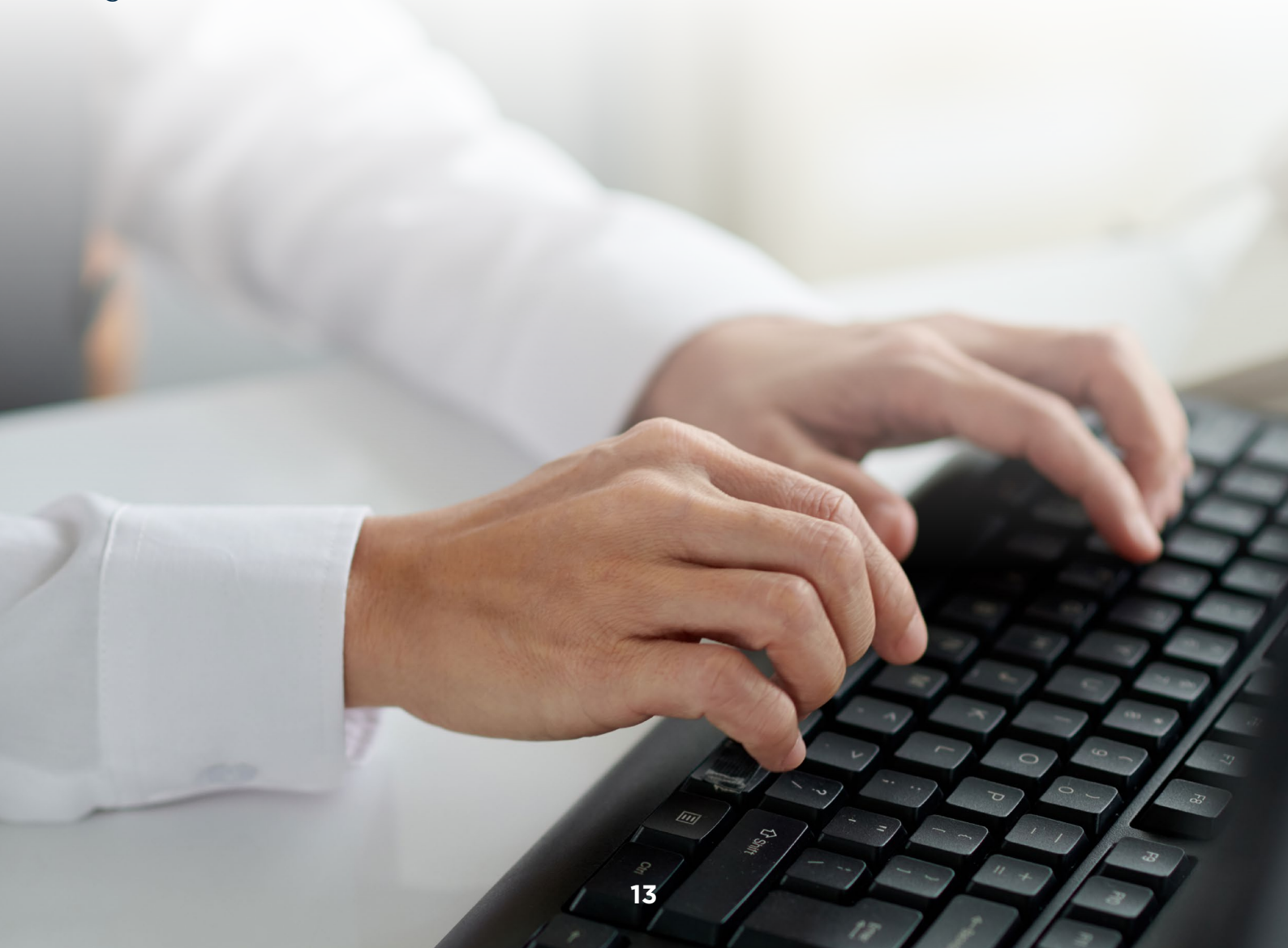
# Fully compliant. Fully transparent.

**MoveIT is built to support agents commercially and compliantly. It operates with full adherence to:**

- Referral fee disclosure requirements
- GDPR and UK data protection legislation
- Cyber security best practice
- Privacy and data handling policies
- The Estate Agency Code of Conduct

All referral relationships are clearly disclosed to all parties, ensuring transparency, trust, and regulatory confidence at every stage of the transaction.

Client data is handled securely, access is controlled, and information is only shared where appropriate and authorised – protecting both the agent and their clients.



# A unique addition to the market

MoveIT is unique in its ability to fully automate the moving workflow, replacing the need for manual oversight with a structured, audit-ready, revenue-driven solution.



The system is carefully built around a unique tripartite connection model that links **the client, the supplier, and the estate agent** within a single, automated workflow.

This structure ensures full transparency, real-time updates, and seamless communication throughout **the entire transaction**.



# Not an add-on. A differentiator.

MoveIT isn't sold as an afterthought.

**It's positioned as part of the agent's core proposition, supporting:**

- Stronger vendor confidence
- Better buyer experience
- Smoother transactions
- More predictable outcomes

And yes – it also generates additional income. But the real value is winning more business in the first place.

