

RENTALIZE · BUYER'S GUIDE 2026

UK & IRELAND · FOR LETTING AGENTS, BTR, AHBS, LAS

# How to Choose Property Management Software in 2026

A vendor-evaluation framework, scoring rubric, TCO calculator and 78 questions to ask any vendor before you sign. Built for compliance-heavy markets — Renters Rights Act 2025, RTB, HAP, Cost Rental, RPZ.

10 sections · 32 pages

78 questions for vendor demos

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**How to use this guide.** Read sections 1-3 once. Use sections 4-7 in every vendor demo. Print sections 11 and use them as live worksheets when you compare 3+ vendors. Most teams complete a structured evaluation in 4-6 weeks using this framework. Without one, the median UK procurement we see runs 9-14 months and ends with a vendor that's wrong for the team.

# 1. Why this guide exists

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Property management software is a 7-12 year decision. The vendor you sign with in 2026 will hold every tenancy, every payment, every notice, every certificate, and every audit log for the rest of the decade. If you choose wrong, you don't just lose money on the licence. You lose the time and morale of every team member who fights it daily, you lose tenants to slow service, and you lose properties under management because owners and AHBs leave for agencies who can move faster.

The single biggest predictor of a bad outcome is **the buying process itself**. Teams who skip a structured evaluation almost always pick the vendor with the best demo theatre, not the best operational fit. Six months in, they discover the demo features don't extend, the data model is rigid, the integration list was aspirational, and the support model is email-only.

This guide gives you the framework most procurement teams don't have: a defined problem statement, a 9-category scorecard, a TCO calculator, 78 demo questions, and templates for the RFP and decision memo. Used end-to-end, it shifts the buying conversation from "do you like the demo?" to "does this vendor reduce risk and cost on a known list of operational categories?"

**Who this guide is for.** UK letting agencies (10-500+ units), Build-to-Rent operators, Irish AHBs and Local Authorities, social housing teams, BTR operators in Ireland, and anyone evaluating Reapit, Goodlord, Arthur, PayProp, Alto, Landlord Vision, Letman, Acquaint, MRI, Yardi, AppFolio, or Rentalize. The framework is vendor-neutral and adapts to any size operation.

## 2. The 6 buying mistakes that cost you 18+ months

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### Mistake 1: Demo-led evaluation

You see three demos. They all look polished. You pick the one with the best presenter. Six months later you discover the workflow on slide 4 was a custom-built one-off, not a product feature. The vendor's product manager confirms it on a quarterly call. You're now stuck.

**Fix:** require every claimed feature to be either (a) shown in a sandbox you can log into yourself, (b) referenceable to a documented product page with a version number, or (c) given a delivery date in writing.

### Mistake 2: Letting Sales drive the evaluation timeline

Vendor Sales will give you a 14-day-only "discount" to force commitment. Discounts that expire fast are designed to short-circuit your evaluation. Real discounts hold for 90+ days for any serious 5-year contract. If a vendor will not extend a discount past your evaluation period, that tells you what their renewal posture will be in year 3.

**Fix:** set your evaluation timeline before you talk to any vendor. Refuse to compress it. The discount you "lose" is almost always smaller than the cost of the wrong choice.

### Mistake 3: Using the wrong reference customers

Vendors hand you their three best references. They've been coached. They got special pricing or special success management. Their use case is rarely yours. **Fix:** always ask for two references the vendor did *not* hand-pick — for example, a customer who renewed last year, and a customer who churned in the last 12 months. Vendors who refuse the second one are telling you they cannot face that conversation.

### Mistake 4: Skipping the data export test

Most teams do not test data export until they're trying to leave the vendor 4 years later. By then the data is held hostage and the migration costs are existential. **Fix:** in the evaluation, demand a full data export of a sandbox account in CSV/Parquet format with documented schemas. If the vendor cannot produce one in 5 working days, your future leaving cost is high.

### Mistake 5: Ignoring the support SLA

The brochure says "24/7 support." The fine print says email-only with 48-hour first-response SLA, no phone, no Slack, no dedicated CSM under 100 units. Three months after go-live, you have a tenant payment failure and you cannot reach a human for 2 days. **Fix:** get the SLA in writing with explicit channel definitions and response-time vs resolution-time distinctions.

## Mistake 6: No compliance audit

This is the costliest mistake in 2026. UK letting agents who chose vendors that have not yet shipped Renters Rights Act Section 8 grounds, decent homes, database registration, or pet insurance workflows are now scrambling. Irish operators who chose vendors that don't auto-generate RTB Annual Registration, RPZ rent calculations, or HAP forms find themselves doing manual work for every tenancy.

**Fix:** use Section 5 of this guide as a compliance test. A vendor that fails 3+ items there will burn 200-400 hours/year of your team's time on workarounds.

**The cost of these mistakes.** A 200-unit UK agency that picks the wrong vendor loses ~£40,000-£80,000/year in staff time on workarounds, plus £30,000-£60,000 in re-migration costs when they switch. The decision compounds: bad vendor years are not recoverable.

## 3. Define the problem before the shortlist

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Most evaluations skip this step and go straight to demos. Don't. Spend a half-day with the team writing answers to the eight questions below. The output is a one-page problem statement that every vendor demo gets measured against.

### The 8 problem-definition questions

1. **What's the bleed?** Where is the team currently spending 3+ hours/week that should be automated? List the top three.
2. **What's the regulatory exposure?** Which compliance items are you currently managing in spreadsheets, email, or by memory? (RTB registration, RPZ rent caps, HAP, Right to Rent, deposit protection, Section 8/21, energy certificates, electrical safety.)
3. **What's the integration shortlist?** Banking (Open Banking, BACS, SEPA), accounting (Xero, Sage, QuickBooks, NetSuite), tenant screening, document signing, RTB API, HMRC MTD, tenant comms.
4. **Who are the users and what are their use cases?** Front desk vs back office vs maintenance vs accounting vs senior leadership — they have completely different daily workflows.
5. **What's the data volume and complexity?** 50 units vs 500 vs 5,000. Single product (lettings) vs three (lettings + sales + block management) vs five (+ BTR + cost rental + commercial).
6. **What does great look like in 12 months?** Concrete numbers: arrears under 3%, 95% rent collected on day 1, maintenance closed in <5 days median, RTB registrations zero-touch, audit-ready in 1 day instead of 4 weeks.
7. **What's the budget envelope, all-in?** Not just the licence — implementation, integrations, training, ongoing optimisation, internal team time. (Section 6 has the model.)
8. **What's the failure mode if we wait 6 more months?** If the answer is "nothing breaks," you're not ready to procure. If it's "we'll lose 20% of LL on contract renewal because of the new compliance regime," you have urgency that should drive the timeline.

### Output: the one-page problem statement

From the answers above, write 8-10 sentences in the format:

*"We are a [size] [type] in [region] managing [units] across [products]. Our top operational pain is [bleed], costing us [hours]/week and [£] in opportunity cost. Our top compliance exposure is [regulation], with [N] tenancies currently at risk. We need [3-5 must-haves]. We must not compromise on [2 hard constraints]. Budget envelope is [£] over [N] years, with [success metric] as the success bar at month 12."*

This statement goes to every vendor at the start of every demo. It anchors the conversation. Vendors who try to redirect the conversation away from this statement do not understand or do not solve your

problem.

## 4. The 9-category scoring rubric

Score every shortlisted vendor on these 9 categories. Each is worth 0-10. Total is out of 90. Below 60, walk away. 60-72 is workable with caveats. 73-82 is a good fit. 83+ is rare.

CATEGORY	WHAT YOU'RE SCORING	WEIGHT	SCORE (0-10)
1. Compliance fit	Coverage of UK/IE regulations critical to your operation. See Section 5.	1.5x	___/10
2. Workflow depth	How many of your top 10 daily workflows are first-class features (not workarounds).	1.3x	___/10
3. Data model fit	Does the schema represent your reality (multi-property, joint tenancies, sub-tenancies, rent units, parking spaces, multi-portfolio)?	1.2x	___/10
4. Integrations	Native (not Zapier-bridged) integrations to your top 5 systems. Number, depth, bidirectional, real-time vs batch.	1.1x	___/10
5. Reporting & audit	Out-of-box reports, custom reports, immutable audit log, export of full history.	1.0x	___/10
6. UX / adoption	How long does a new front-desk user take to be productive? Mobile UX. Tenant portal UX.	1.0x	___/10
7. Support	SLA, channels, dedicated CSM, response vs resolution time, escalation path.	1.0x	___/10
8. Pricing & TCO	5-year all-in TCO. Implementation, licence, support, training, integrations, your team time.	0.9x	___/10
9. Roadmap & vendor stability	Funding, churn rate, customer count, roadmap publicly committed, post-acquisition risk.	0.8x	___/10

Apply the weight to each score, then sum. Compliance has the highest weight because compliance failures in 2026 are not minor — they are existential. A vendor scoring 9/10 on workflow but 4/10 on compliance is a worse choice than one scoring 6/10 on workflow and 9/10 on compliance.

### How to score each category

Don't trust marketing. For each category:

- **Show me, don't tell me.** Score 8+ requires the vendor to demonstrate the feature in a sandbox you can log into.
- **Two reference calls.** Score 7+ requires two reference customers (one similar size, one larger) who confirm the category from real use.
- **Failure cases.** Score 9+ requires the vendor to articulate where the feature falls short and what they're doing about it. Vendors who claim 10/10 on everything are scoring 6/10 on credibility.

**Tip.** Score independently before vendor calls compare notes. Three evaluators scoring the same vendor will produce a 1-2 point variance per category. If they're identical, your evaluators are anchoring on each other and you've lost independent judgement.

## 5. Compliance: the make-or-break category in 2026

The single biggest market shift in UK letting and Irish rental management between 2024 and 2026 has been compliance. The Renters Rights Act 2025 received Royal Assent on 27 October 2025 and comes into force 1 May 2026. The Section 21 abolition, Section 8 reform, decent homes standard for the PRS, and database registration alone require any vendor to ship 12+ new workflows. In Ireland, the RPZ regime expanded nationwide in mid-2026 and RTB Annual Registration is now mandatory.

Below is the compliance audit. Your shortlist vendor either has the feature shipped today, has a public roadmap commit with a date in writing, or doesn't have it. Anything else is marketing.

### UK Renters Rights Act 2025 (in force 1 May 2026)

CAPABILITY	REQUIRED	VENDOR STATUS
Section 21 notice removed from defaults; Section 8 grounds workflow with the new mandatory grounds (1A landlord move-back, 6A redevelopment, etc.)	Must	Shipped / Roadmap / No
Section 8 ground 8 (rent arrears) — auto-detection of qualifying arrears periods, notice generation, court bundle export	Must	Shipped / Roadmap / No
Periodic tenancy default — assured shorthold tenancies converted; no fixed-term offered after 1 May 2026	Must	Shipped / Roadmap / No
Rent increase via Section 13 notice — once-per-year cap enforced, two-month notice template, market-rent justification field	Must	Shipped / Roadmap / No
Decent Homes Standard for PRS — habitability checklist, defect tracking, remediation deadlines	Must	Shipped / Roadmap / No
Database registration — landlord/property data feed to the new Privately Rented Property Portal	Must	Shipped / Roadmap / No
Pet insurance workflow — request, decision, evidence retention, dispute handling	Should	Shipped / Roadmap / No
Discrimination prevention — auto-block of "no benefits" or "no children" wording in adverts and tenancy decisions	Should	Shipped / Roadmap / No
Awaab's Law — hazard response timers (14 days for serious; 7 for emergency)	Should	Shipped / Roadmap / No

## UK ongoing compliance

CAPABILITY	REQUIRED	VENDOR STATUS
Right to Rent checks — share code verification, expiry tracking, document storage, auto-recheck before expiry	Must	Shipped / Roadmap / No
Deposit protection — DPS, MyDeposits, TDS — auto-protection within 30 days, prescribed information generation	Must	Shipped / Roadmap / No
EICR — 5-year cycle tracking, expiry alerts, certificate storage, tenant evidence sharing	Must	Shipped / Roadmap / No
Gas Safety Certificate — annual cycle, CP12 storage, tenant evidence sharing	Must	Shipped / Roadmap / No
EPC — minimum E rating today, expected C uplift by 2030, expiry tracking	Must	Shipped / Roadmap / No
HMO licensing — selective and additional licensing schemes, licence expiry tracking, occupancy limits	Should	Shipped / Roadmap / No
Client Money Protection — annual scheme renewal, evidence retention	Should	Shipped / Roadmap / No
HMRC Making Tax Digital — quarterly submission, agent connection, end-to-end VAT and Income Tax	Should	Shipped / Roadmap / No

## Ireland — RTB & rental compliance

CAPABILITY	REQUIRED	VENDOR STATUS
RTB Annual Registration — automated submission, RTB API integration, fee calculation, evidence retention	Must	Shipped / Roadmap / No
RPZ (Rent Pressure Zone) — nationwide rent cap calculation, rent review timing, justified-increase records	Must	Shipped / Roadmap / No
HAP — landlord onboarding, tax compliance check, tenant top-up calculation, council interaction	Must	Shipped / Roadmap / No
Notice of termination — Part 4 tenancies, valid grounds, notice periods table, RTB-compliant template	Must	Shipped / Roadmap / No

CAPABILITY	REQUIRED	VENDOR STATUS
Minimum standards (SI 137 of 2019) — habitability checklist, inspection log, remediation tracking	Must	Shipped / Roadmap / No
BER (Building Energy Rating) — expiry tracking, evidence retention	Should	Shipped / Roadmap / No
Cost Rental — eligibility scoring, NOAC reporting, market-comparison rent setting, AHB compliance	Should	Shipped / Roadmap / No
Differential rent — local-authority rent calculation by household income across all 31 LAs	Should	Shipped / Roadmap / No

## How to use this audit

Send the three tables above to the vendor with two columns added: "Live URL of demo / sandbox" and "Reference customer using this in production." Score 10/10 on Compliance only if 80%+ of "Must" items are shipped today and the rest have a public roadmap date within the next 6 months.

**The 2026 risk.** If a UK letting agent's vendor has not shipped 6+ of the RRA "Must" items by 1 May 2026, you will be doing 200+ hours/year of manual notice generation, manual periodic-tenancy tracking, and manual database registration. That's a full-time hire's worth of work that the vendor was supposed to absorb.

## 6. Total Cost of Ownership (TCO) calculator

Listed price is rarely TCO. The real cost includes implementation, integration build-out, training, internal team time, ongoing optimisation, and the cost of switching when you eventually leave. Below is a model for a 250-unit UK agency. Adapt the multipliers to your scale.

### 5-year TCO for a 250-unit UK letting agency (£)

Year 1: licence (£12-£30 per unit/month)	£42,000
Year 1: implementation fee	£18,000
Year 1: integration build-out (Xero, banking, RTB, screening)	£12,000
Year 1: training + change management (35 hours team time × £45)	£8,000
Year 1: data migration from prior system	£15,000
Year 2-5: licence (£42K × 4 × 1.05 indexed)	£176,000
Year 2-5: ongoing optimisation, custom reports, support uplifts	£24,000
Year 2-5: internal team time on workarounds (200hr × 4yr × £45)	£36,000
<b>5-year TCO (good fit, score 80+)</b>	<b>£331,000</b>

### 5-year TCO if you pick the wrong vendor (score 60-65)

Same licence, implementation, training	£295,000
Internal workaround time (800hr/yr × 4yr × £45)	£144,000
Compliance gap remediation (manual RRA notices, RPZ calcs)	£60,000
Re-migration cost in year 4 (you switch)	£40,000
Lost LL on contract renewal (3% churn × revenue impact)	£75,000
<b>5-year TCO (wrong fit)</b>	<b>£614,000</b>

The delta — £283,000 over 5 years — is what a structured evaluation buys you. Spending 6 weeks on a proper buying process to save £283K is the single highest-leverage operational decision a UK or IE letting agency makes this decade.

## Adapt the model to your scale

- **50 units:** divide all figures by 5. The TCO delta is still £55K — outsized for your operation size.
- **1,000 units:** multiply by 4. The TCO delta becomes £1.1M.
- **BTR / 5,000+ units:** the licence model usually shifts to flat-rate enterprise pricing. The biggest hidden cost is custom integration build-out (£60K-£150K). Contract enterprise SLAs and API rate limits up-front.
- **Irish AHB / LA:** add Cost Rental NOAC reporting time, RTB Annual Registration time across the portfolio, HAP back-office, and differential rent recalculation. The internal team time saved by a good vendor is typically 2x the licence cost.

## 7.78 questions to ask in vendor demos

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Use these in every shortlisted vendor's demo. Group them across three meetings: Discovery (30 questions), Deep Dive (30), Reference Calls (18). Vendors who push back on the structure are signalling that their answers are weakest where you ask hardest.

### Discovery (30 questions, first meeting)

#### Workflow & data (10)

**1. Show me, in your sandbox, how a tenant moves from application to first rent payment.**

Why this matters: this is the single most-used workflow. If it's clunky in the demo, it's clunkier in production.

**2. Show me how a Section 13 rent increase notice is generated under the Renters Rights Act regime.**

Tests whether they've actually shipped the workflow or just claim to have.

**3. How does your data model represent a joint tenancy with 4 tenants and one guarantor?**

Many systems flatten this and you cannot differentiate liability.

**4. Show me the same tenant across two properties — historical and current.**

If the system is property-centric not tenant-centric, you'll miss tenant lifetime value.

**5. How do I add a custom field — and how does it appear in reports?**

If custom fields don't propagate to reports, they're decorative.

**6. Show me the maintenance workflow from tenant report to closure.**

**7. Where is the deposit lifecycle visible — protection, move-out deductions, dispute resolution?**

**8. Demonstrate one batch operation — e.g., apply a rent increase to 47 properties at once.**

**9. How does the system represent a property with multiple revenue streams (rent + parking + storage)?**

10. Show me a tenant moving from end-of-tenancy to a new tenancy in a different property.

## Compliance (10)

11. Walk me through your full Renters Rights Act 2025 implementation. What's shipped, what's roadmapped, what's not happening?

12. Show me Section 8 grounds 1A and 6A workflow.

13. How do you handle the periodic-tenancy default under the new regime?

14. Show me Right to Rent share-code verification, including expiry tracking and recheck.

15. Demonstrate deposit protection — auto-protect within 30 days, prescribed information generation.

16. Show me how EICR, Gas Safety, and EPC expiry alerts work — and how a tenant gets evidence.

17. (Ireland) Show me one full RTB Annual Registration submission via API.

18. (Ireland) Show me the RPZ rent calculation for a Dublin 8 property under nationwide RPZ rules.

19. (Ireland) Demonstrate a HAP landlord onboarding from tax-compliance check to first payment.

20. What's your immutable audit log? Show me a record I cannot delete or alter.

## Integrations & data (10)

21. Which integrations are native vs Zapier-bridged vs "we have an API"?

22. Show me the Xero/Sage/QuickBooks integration — bidirectional or one-way?

23. What's your Open Banking implementation — TrueLayer, GoCardless, Tink? Real-time?

24. Show me a full data export — every table, full history, in CSV/Parquet, schemas documented.

25. What's the API rate limit? What's the webhook retry policy?

26. Show me your tenant portal in mobile and desktop.

27. Show me the contractor portal — work orders, invoices, evidence.

28. What's your data residency? UK, EU, US?

29. Show me your SSO implementation — SAML, OIDC, MFA enforced.

30. What's the customer data backup cadence — and who owns the backup?

## Deep Dive (30 questions, second meeting)

### Failure cases (10)

31. Tell me about your biggest customer outage in the last 12 months. What happened, what was the resolution time, what changed?

32. Where does your product fall short relative to your top competitor?

33. Where in your data model do you have known limitations?

**34. What's the largest customer who has churned in the last 24 months and why?**

**35. What's the failure mode if Open Banking goes down for 4 hours during a rent collection day?**

**36. What happens to my data if your company is acquired?**

**37. What's your incident communication policy — public status page? Customer email within N minutes?**

**38. Walk me through a real bug from your support tracker — how was it triaged and resolved?**

**39. What's the workflow we cannot do today? (If "none," score 5/10 on credibility.)**

**40. What's the worst customer feedback you got this quarter?**

## **Pricing & contract (10)**

**41. What's the all-in 5-year TCO for a [your size] customer?**

**42. What's the implementation fee, and is it fixed-price or T&M?**

**43. What's the annual price escalator — CPI, fixed %, vendor discretion?**

**44. What's the termination clause — notice period, exit data fee, partial-year refund?**

**45. Are there per-feature add-ons that are not in the base licence?**

**46. What's the SLA — uptime, response time, resolution time, by severity?**

**47. What's the SLA penalty — service credit %, capped at what?**

48. What integrations cost extra and how much?

49. What's the data export cost on termination?

50. What's the volume discount step — 100, 500, 1000 units?

### People & roadmap (10)

51. Who is my dedicated CSM? What's their case load?

52. What's your support team headcount? Hours of cover? Channels?

53. What's your engineering headcount and product team headcount?

54. Show me your public roadmap with dates.

55. What's your release cadence — weekly, monthly, quarterly?

56. How are customer feature requests prioritised?

57. Who owns the company? Founder-led, VC-backed, PE-owned, public?

58. What's your funding runway?

59. What's your customer churn rate (gross and net revenue)?

60. What's your NPS or CSAT, and how is it measured?

### Reference calls (18 questions across two customers)

Always do two reference calls, ideally one of similar size and one larger. The vendor will offer their best references — accept those, but also ask for two more from a list you build (LinkedIn search of customers, public case studies). Do at least one call with a reference the vendor did not pre-coach.

**61. How long was implementation, and how did it compare to the vendor's promise?**

**62. What's the response time you actually get on a Tuesday morning support ticket?**

**63. What's the workflow you fought against — i.e., the system makes you do it the wrong way?**

**64. What feature did the vendor demo that turned out not to exist or to be limited?**

**65. What was the largest unexpected cost?**

**66. Has there been a price increase, and was it negotiable?**

**67. What's the worst outage you've experienced and how was it handled?**

**68. What integrations work well and which are flaky?**

**69. What does the team complain about most?**

**70. What did you wish you knew during the buying process?**

**71. Would you choose this vendor again? On a 0-10 scale, how likely are you to recommend?**

**72. How responsive is the product team to feedback?**

**73. What's the actual experience of training a new staff member?**

**74. What's the experience of training a new tenant on the portal?**

**75. Has compliance kept up — what's missing for RRA, RPZ, RTB?**

**76. How does data export actually work if you have to go to a regulator?**

**77. What's the renewal-conversation experience like?**

**78. If you were buying again today, what would you do differently?**

## 8. Red flags that should end the demo early

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Some vendor behaviours are reliable signals that you'll be unhappy in 18 months. If you see two or more, walk away — the cost of switching mid-evaluation is far smaller than the cost of switching mid-contract.

- **Refuses to give sandbox access** beyond a single guided demo. **Major** They're hiding a fragile product.
- **"That's on the roadmap"** for 3+ critical features without dates in writing. **Major** Roadmap without dates is marketing.
- **Heavy customisation/development for basic workflows.** **Major** If it's "we'll build it for you," your migration risk just doubled.
- **SLA only includes uptime, not response/resolution time.** **Major** 99.9% uptime is achievable with a chronic 4-day support backlog.
- **Cannot produce a full data export in 5 working days.** **Major** You will be locked in.
- **Pricing varies by 3x across customer segments without justification.** **Major** Year-3 renewal will be opaque.
- **References are all under 12 months tenure.** **Major** Long-term satisfaction is unproven.
- **No public security documentation** (SOC 2, ISO 27001, penetration test summary). **Major** If they had it, they'd lead with it.
- **Demo presenter doesn't know answers to compliance questions, defers to "I'll get back to you."** **Minor** Acceptable once. Repeated 3+ times means the vendor doesn't know its own product.
- **Frequent recent leadership changes** (CTO, Head of Product, CEO in last 18 months). **Minor** Roadmap stability is at risk.
- **Pushes back on talking to the engineering team.** **Minor** A confident vendor lets you talk to engineers.
- **Won't let you test the mobile experience on your own device.** **Minor** The mobile UX is bad.

**Green flags worth weighting up.** Vendor sends you their unedited support response-time stats. Vendor introduces you to a customer who churned and won them back. Vendor has a public roadmap with dates. Vendor has named release versions per quarter. Vendor proactively volunteers what they don't do well. Vendor's CEO/CTO appears in a 30-minute call without 6 weeks of scheduling.

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## 9. Migration: how 8-12 weeks becomes 18 months

The migration plan is where vendor sales cycles fail and customers get bitter. Here is what actually happens at a 200-unit UK letting agency switching from a legacy system to a modern PMS.

### The honest timeline

WEEK	WHAT HAPPENS	HIDDEN RISK
Week 1-2	Kickoff, project plan, data audit	You discover your old data has duplicates, missing fields, and broken parent-child links you didn't know about.
Week 3-4	Data mapping	30% of fields don't map cleanly; you have to make business decisions about what to drop or merge. Every decision needs sign-off.
Week 5-7	First migration pass to sandbox	Test data shows ~5-15% of records have integrity problems. You spend evenings cleaning data.
Week 8-9	Workflow configuration, integrations	Xero integration sometimes works, sometimes doesn't. RTB API has rate limits no one mentioned.
Week 10-11	Training, parallel run	Team is doing the job in both systems for 2-3 weeks. Productivity drops 30%. Some staff resist.
Week 12	Go-live	2-3 critical bugs surface in week 1. Vendor support response is 4-24h. You handle the hot ones.
Month 4-6	Stabilisation	Reports that worked in sandbox don't work at scale. Custom report build-out is £4-8K extra.
Month 7-12	Optimisation	Features you thought existed turn out to require a paid module. New compliance regs ship and the vendor's roadmap slips.

### The 7 things to demand in the migration plan

1. **Data mapping document** from day one — every field of your source system mapped to a field of theirs, with a "Drop / Merge / Custom" decision in writing.
2. **Three sandbox migrations** before the live cut, each 2 weeks apart. Final cut runs on the third clean.
3. **Named technical implementation lead** on the vendor side, a single person, with their email/Slack/phone. Not a "team."
4. **Weekly status meeting** with attendance from the implementation lead AND a product person.
5. **Defined go/no-go criteria** in writing — at least 95% of test data passing integrity checks, all top-10 workflows tested, training complete, parallel run successful.
6. **30-day post-go-live war room** — a daily 15-min check between vendor + customer for the first month.
7. **Rollback plan** if go-live fails — the legacy system stays available read-only for 90 days.

**The 18-month story.** Migrations slip from 12 weeks to 18 months when (a) data quality was worse than assumed, (b) workflow assumptions were wrong, (c) the vendor's PM left, (d) compliance changed mid-project, or (e) the team didn't get backfill and had to do migration plus daily ops simultaneously. Plan for the slip — give yourself a 4-month buffer and 30% time backfill.

## 10. Negotiating the contract

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Contract negotiation is where you bank the value of your evaluation. Vendors who passed the evaluation will negotiate; vendors who didn't will not negotiate because they don't want you to discover what they're hiding.

### The 12 contract points worth negotiating

1. **Year-1 implementation discount** — 30-50% off implementation fee on a 3-5 year licence commit.
2. **Annual price escalator capped** — CPI or 3%, whichever is lower. Refuse vendor-discretion clauses.
3. **Volume discount tier-locked** — when you cross 500/1000 units, the per-unit price drops automatically; not negotiated again.
4. **Termination for convenience** with 90-day notice in the last 12 months of the term, no penalty.
5. **Data export on termination** — fixed cost (e.g., £2K) or free, with format and timeline defined.
6. **SLA penalties** — service credit equal to 1 day's licence fee per hour of unscheduled downtime, no cap.
7. **Roadmap commitment** — if 4+ features promised in evaluation are not shipped within 12 months, you get a 6-month licence credit.
8. **Audit rights** — you can audit their security and SOC 2 once per year.
9. **Data ownership** — explicit clause that data is yours, never theirs, even after termination.
10. **Acquisition trigger** — if vendor is acquired, you get a 90-day exit window without penalty.
11. **Indemnity** — vendor indemnifies you against compliance failures caused by software defects (Section 21 notice generation, RPZ calculation, etc.).
12. **Named CSM minimum tenure** — if your assigned CSM changes more than once in 24 months without your approval, you get an out clause.

**The negotiation playbook.** Negotiate on 6+ points; concede on 2-3 you don't care about. Most vendors will give 30-40% of asks on a 5-year deal. The points they refuse outright tell you their commercial strategy. A vendor who refuses to commit to roadmap delivery is signalling that their roadmap is fiction. A vendor who refuses to define data export cost is signalling lock-in is part of their strategy.

# 11. Templates

## Template 1: One-page RFP

**Subject:** RFP — Property Management Software for [Company], [N] units, [region]

**Background:** [2-3 sentences on company]

**Problem statement:** [Output of Section 3]

**Must-haves:** [3-5 from compliance audit + workflow]

**Hard constraints:** [budget, region, integrations]

**Evaluation timeline:** [4-6 weeks defined]

**Decision criteria:** 9-category rubric (Section 4) — share with all vendors

**Attached:** Compliance audit table (Section 5), TCO model (Section 6), 30 discovery questions (Section 7)

**Reply by:** [date]

## Template 2: Vendor scorecard

CATEGORY	VENDOR A	VENDOR B	VENDOR C	NOTES / EVIDENCE
1. Compliance fit (1.5x)	___/10	___/10	___/10	
2. Workflow depth (1.3x)	___/10	___/10	___/10	
3. Data model (1.2x)	___/10	___/10	___/10	
4. Integrations (1.1x)	___/10	___/10	___/10	
5. Reporting (1.0x)	___/10	___/10	___/10	
6. UX (1.0x)	___/10	___/10	___/10	
7. Support (1.0x)	___/10	___/10	___/10	
8. Pricing/TCO (0.9x)	___/10	___/10	___/10	
9. Roadmap (0.8x)	___/10	___/10	___/10	
<b>Weighted total / 99</b>	—	—	—	

## Template 3: Decision memo

**Decision:** We recommend [Vendor] for a [N]-year contract.

**Why:** Highest weighted score ([X]/99). Clearest evidence on Compliance ([RRA / RPZ / HAP]) and Workflow Depth ([top 3 workflows]). Reference calls confirmed [3 specific points].

**Why not the runner-up:** [1-2 specific gaps].

**Risk register:** [Top 3 risks with mitigations.]

**Contract asks won:** [List the 3-5 contract points won during negotiation.]

**Implementation lead:** [Vendor named individual + customer named individual.]

**Go-live target:** [Date]

**Success criteria at month 12:** [3 numbers from Section 3 question 6.]

## Want a structured second opinion on your shortlist?

Rentalize is one of the modern PMS options for UK and Irish property operators. We'll happily do a 30-minute consultation on your shortlist — even if Rentalize isn't on it. We've helped 25+ teams pick the right system in the last year, including teams who chose competitors.

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## About Rentalize

Rentalize Software Limited is an Irish-headquartered (Dublin 8, CRO #765596) property management software vendor serving UK letting agents, BTR operators, Irish AHBs, Local Authorities, and social housing teams. We support the full UK Renters Rights Act 2025 regime, Irish RTB Annual Registration, RPZ rent caps, HAP, Cost Rental, and Differential Rent. We are a member of the Property Redress Scheme (UK) and registered under the RTB framework (Ireland).

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