



Utah Startup Sees 120% Growth in 18 Months with TOPS [ONE]

Having a background in accounting, Trever Midgley is used to everything adding up. When he decided to leave his career in banking to form his own community association management firm, the numbers were in line, and the timing made sense. But his decision was based on more than just logic.

Trever had a vision; one where he could spend long summer days with his growing family. Where he wouldn't be tied down to an office, but could still have an interesting, thriving career that included real work/life balance.

He found that balance and more, when he chose to take on TOPS as his company's technology partner.

An Accountant Discovers Community Management

When Trever moved into his first condominium in 2007, he did not anticipate the course his career would take in the next eleven years. With a master's in accounting and a career as an auditor for a CPA firm, he was used to tracking the flow of money. But as he became familiar with his condominium association, he began to notice how the nonprofit corporation was operating.

"There were red flags. I wanted to know where my money was going, so I'd ask for a financial report and they couldn't provide it to me," Trever said.

HOA STRATEGIES

a better community experience

HOA STRATEGIES IS UTAH'S
HOA MANAGEMENT FIRM,
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HOA MANAGEMENT,
CUSTOMIZED TO FIT THE
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That's when Trever got involved. He joined the board of directors and began the search for a professional management company. But the companies the board interviewed couldn't meet the community's needs. He realized that with his background, he could offer better services than the ones already on the market.

What began as providing management services for his own condo association grew into a prosperous side hustle in the years that followed, as more communities sought out Trever's skills through word of mouth.

In 2013, Trever officially set up his business, **HOA Strategies**. Using QuickBooks and other off-the-shelf products, Trever was able to deliver on the promise of financial excellence for his clients, but growth was slow. Even as his HOA side business grew, Trever continued to pursue his career in the financial services industry.

Trever knew if he dedicated himself to his business full-time, he had the opportunity to make a successful company. Most importantly, however, was the ability to be independent.

"Being able to drive my own mission, to help people in my local community, to set my schedule and work/life balance—those were the kinds of decisions I was looking at," he said.

Plus, the idea of entrepreneurship was appealing. "I kind of had that goal throughout my life. I liked having that freedom of a small business and being able to build things, put processes in place and make things better for others."

For this career change to be successful, Trever knew he needed to find the right tools to meet his needs. Married with four children (ages 2, 4, 6, and 8), family time was precious. "Finding automation tools that gave me that work/life balance was important for me to make that work."

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Committing to the HOA Business

In his corporate career, Trever had guaranteed income, pay increases, bonuses, and benefits. Going on his own might involve more uncertainty, but Trever's ten years of success with community association management had proven his business model was solid, and the HOA industry had a need for more skilled accountants to help with their budgets, reserve planning, and financial reports.

TOPS [ONE] Delivers Core Solutions for HOA Strategies

Trever began searching online for software programs designed for HOA accounting and management. "I saw this really could expand exponentially if I wanted to put the time into it. That's when I started looking for a software provider that would help me more than just off-the-shelf products."

Trever also wanted a product that could be a core software for the company. “One of my criteria was that [the product we chose] had to be a cloud-based solution,” he said.

He liked that TOPS [ONE] had different modules specific to community association management. “I brought TOPS on because I needed that [industry-specific] foundation in order for me to move forward with my business.”

Armed with TOPS [ONE], Trever felt confident about quitting his banking career in favor of building his own business, HOA Strategies, into a full-time, full-service solution for community associations. In 2018, Trever brought on Joseph Groberg as a partner and Chief Operations Officer. Together, they took on the task of deliberately growing the business.

to get that data into their QuickBooks accounting system. With TOPS [ONE]’s Smart Banking tools, HOA Strategies saw an immediate improvement in time savings. “Before, we were doing manual data entry on customer payments that could take an hour [to] two hours a day,” Trever said. “Now that’s done in three minutes.”

TOPS [ONE] Easy Enforce Cuts Violation Processing Time by 83%

Tracking violations involves a lot of moving parts—and the more complicated the process, the more opportunity for errors. “Before, I was spending two or three hours to do 45 violations. Now I spend maybe 15 minutes,” he said.

Trever says TOPS [ONE] simplified that process. “A manager can be in the field taking photos, upload

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TOPS [ONE] Saves Time and Fosters Growth for HOA Strategies

Most entrepreneurs starting their business have no data to compare one solution to another, but with 10 years of community association management on his, Trever is able to directly attribute the savings his company has experienced since making the choice to implement TOPS [ONE]:

TOPS [ONE] Smart Banking Saves 30 - 40 Hours Every Month

Before moving to TOPS [ONE], recording homeowner payments was a time-intensive process. Even with a bank lockbox service to collect checks, a lot of manual entry still had to be done

them directly into the homeowner’s account from their phone, and automatically generate a letter to the homeowner that includes the specific violation, the photo, and the CC&R reference. This system gives homeowners the information they need to make corrections, and speeds up the process for the managers.”

TOPS [ONE] Communications Tools Help Build Homeowner Engagement

Whether it’s to inform owners about a meeting or an update on a vendor issue, being able to quickly connect to the right group is an effective way of building trust and homeowner engagement.

“One of the big advantages of TOPS [ONE] was the communications module,” he said. “The ability

to do community-wide email blasts with template letters already attached—that kind of homeowner communication was something that took a lot more effort with other platforms.”

Trever said before TOPS [ONE], the process included downloading the list of homeowners, copying the email addresses (while making sure all of them are bcc'd), adding the template, and sending it off.

Now, he can select the template and the target audience in just a few clicks, ensuring the right people get the right message.

TOPS [ONE] Owner Access Portal with Document Management Cuts Calls by 15%

The ability to give homeowners access to their account information and important community documents was crucial, not only to stay compliant with Utah state regulations, but also to provide homeowners with a highly-requested service.

“In this age of self-service, owners want to be able to look up their information and get their questions answered on their own time,” said Trever.

Since implementing TOPS [ONE] with its online Owner Portal and Document Management features, HOA Strategies has been able to deliver on those expectations. “It’s probably cut down on 15% of phone calls.”

TOPS [ONE] Delivers Results in Growth and Flexibility

Today, just eighteen months after implementing TOPS [ONE], Trever can work from anywhere. He attributes that flexibility to the cloud-based automation tools in TOPS [ONE]. “I can be out at a new community or spending time with my family, and as long as I have a cell phone, I don’t have to sit in an office.”

Since implementing TOPS [ONE], HOA Strategies have added 12 new communities totaling over 1,000 doors, and they’re still growing.

“We’ve set up the base and foundation so that we can take on as many communities as we need to. With TOPS [ONE]’s accounts payable system and integrations, that’s a full-time person that I don’t have to hire because the system will do it for me.”

This is Trever’s strategic vision. “We’re a small company and we are starting to grow. [The key] is having one central resource, where we can search on anything across the portfolio and get instant results.”

With everything contained in the same database, and the flexibility TOPS [ONE] offers through customization, the software has become an integral part of HOA Strategies’ success.

Which, as Trever anticipated all along, adds up perfectly.

Thank you for taking the time to read this story about one of our incredible customers!

Want to Learn More?

TOPS [ONE]

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