

2016

# Employment Manual

MANAGEMENT ONE LICENSED OPERATING SYSTEMS  
KNOWLEDGE BASED MANUAL

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## Introduction

This manual covers all items relating to employees as well as other administrative items that do not fall under other specific job categories.

## Employee Database

Management One Licensed Operating Systems recommends using the JIAN <http://jian-employeefilebuilder.software.informer.com/4.0/> employee database for tracking employment performance, reviews, reprimands, etc.

To check or make changes to the employee Database, open up the link found on the desktop (JIAN Employee File Builder) Please note with later versions these instructions could change somewhat;

1. Click "open existing database", there is no password set up, click ok.
2. Go to file, open, click on **Your Company**, and click ok, there is no password set up, so all you have to do is click ok.
3. To find an existing employee, click on "go to" up at the top, select find, then type in the employee's name.
4. Once you have selected the employee that you are looking for you can use the tree on the left hand side to make any changes or additions. Under "performance" is where you would put in positive or negative feedback. Copy and paste the document from word if it is a memorandum or written warning. You can also just type directly into the box.
5. Under the job history tab is where you would put in any notes of promotion and change the next review date.

## To Add an Employee

1. Open up the database and select add at the bottom of the screen. The employee code is the employee's first initial and then last name. Fill in all the blanks on the first tab then click the Current Job tab and fill in the information there as well. Once you have done this then click SAVE.
2. On the tree select the "relative" tab and this is where you will add the emergency contact information.



3. Then select the "benefit" tab from the tree, this is where you will enter what benefits the employee will be eligible for and when.

### **To Write-up an Employee; with a Memorandum**

1. See memorandum of discussion and written warnings in [m1 software](#) - Search in Doc Drop in the command center

### **To Terminate an Employee**

1. First note under the performance tab as to why the employee was terminated. If they gave notice then copy and paste the notice into the file. If you terminate them, make sure to note in detail why the termination took place. Also note if they left on good terms and are eligible for rehire.
2. Under the Job History tab there is a button at the bottom called "terminate". Select this button and follow the prompts to execute the termination. Once an employee file has been terminated it can't be reinstated. You will have to create a new employee file should the employee come back to work for *"Your Company"*.

## **Payroll and Review System**

### **Pay Period:**

The staff gets paid on the 15th and 30th of each month. If the 15th or the 30th falls on a weekend or holiday then the staff gets paid the work day prior to the regular scheduled date.

All employees should be set up on direct deposit or fee based debit card provided by your payroll service provider (i.e. Chase Card), we don't do hard checks to the staff unless they just started and there is not enough time to get them setup on either of those options.

If a hard check needs to be sent it needs to be mailed out in time for the employees to receive it on the actual pay day.

### **Reviews:**

Reviews take place at 90 days of employment and at one year and annually thereafter. An employee performance packet will need to be filled out by management. Three weeks prior to the review give the employee the employee self-evaluation out of the performance review packet. Give the employee one week to return it to you.

Then print out all positive and negative notes from the Employee Database and turn in the employee performance packet along with the employee self-evaluation to management two weeks prior to the review so they have to time to complete the rest of the packet. Make sure to note the employee name and date of review on the upper right hand corner of the packet.

Once the reviews have taken place, the packets need to be turned in to HR so that the Employee Database can be updated, Payroll can be notified of any pay increases or bonuses, and the review can be placed in the employee file.

### **Incentive Bonus Structure:**

(Amounts may vary by Company)

## Hiring Employees

### Where do you Start?

Some of the resources that you can use to place ads include [www.careerbuilder.com](http://www.careerbuilder.com) [www.monster.com](http://www.monster.com) (monster now owns hotjobs as well) [www.craigslist.com](http://www.craigslist.com) and your local newspaper. There are many other websites where you can use temp-to-hire recruiters to find people with specific training (like accounting or property management jobs) Companies such as [www.roberthalf.com](http://www.roberthalf.com) (for accounting and managerial jobs) [www.kellyservices.com](http://www.kellyservices.com) [www.appleone.com](http://www.appleone.com) [www.adeccousa.com](http://www.adeccousa.com) [www.jobsradar.com](http://www.jobsradar.com) and [www.jobfox.com](http://www.jobfox.com) are a few of the better options.

Many companies are now using Facebook, LinkedIn or Skype to find and hire people as well. There are services such as [www.jibe.com](http://www.jibe.com) that let you connect through the social networks directly through their service.

There are a host of options out there. Find what works best for you.

Craigslist is free in most areas to place an employment ad. They do charge for some counties although it is a very nominal fee in relation to some of the other resources. These ads run for 30 days at a time and you can keep renewing them anytime so that you have a constant pool of resumes to refer to.

With Career Builder and Monster the ad runs for a month, so although you are paying about what you will pay to run an ad in the paper, the paper only runs once or twice. The most efficient way is to purchase a small block of ads to run throughout the year thus making each ad cheaper to run overall. There is no limit on lines or words when running an ad with Career Builder or Monster. These websites are good for hiring Operations Managers, Human Resources, and accounting positions. They tend to draw in more individuals with the qualifications that are required for these particular positions.

You will find sample ads for each position in the job description portion of the manual.

## Hiring Process

1. Put a scripted Ad in Craigslist, Career builders, zip recruiter for all **Divisions**
  - A. Client Coordinator (Receptionist)
  - B. Leasing (Real Estate License preferred, Current Driver's license, and vehicle insurance)
  - C. Accounting/Booking-keeping / Customer Service
  - D. Maintenance Coordinator aka Property Inspector / Property Manager (clean DMV, current Driver's license, and vehicle insurance)
  - E. Manager (Real Estate License required, current Driver's license and vehicle insurance)
  - F. New Property Account Sales (Real Estate License required, current Driver's license and vehicle insurance)
2. Review resumes; looking for candidates that best meet the requirements of needed position.
3. Use Phone Interview Questions form to conduct interview. (If you feel they are a quality prospect then set appointment for them to come in)
4. Have them come in and take all of **Your Company** tests:
  - A. DISC (We highly recommend the Abelson Group testing <http://theabelsongroup.com/> )
  - B. Typing test (minimum 35 WPM)
  - C. Determine by how well they follow your instructions in testing will indicate how they will follow your process and systems
  - D. You will see if they can retain information in the Reading comprehension test
  - E. Work ethic test / Situational Testing
  - F. Run Credit Check & Background Check
5. Tabulate results from testing and call references. If references check out then set appointment with owner or manager for final interview (if applicable). Yes check references before you spend your time interviewing them.
6. Interview with Owner/Manager if they pass the A-F testing. Note for a manager you would want to have 3-5 meetings before you hired them. (Use Interview questions)
7. Put together offer for Applicant - See Salary and Bonus plans ([Accounting](#), [Leasing Consultant](#), [Maintenance](#), [New Property Account Rep](#))
8. Final interview with Owner or Manager if you're a large company (If applicable)  
(List of some of the same questions that the personnel department asked to see if their answers match up)

Go over the position contract with the applicant  
*Optional:* Present them with an offer to join your firm at the end of the interview; or tell them you are still interviewing a few other applicants and you will be notified shortly if they are chosen.

## Sample Ad to Post

[Click here](#) to customize your hiring ad

**Wanted:** Driven Individuals with *Passion* and *Heart*

Have you ever wished you could work with a professional company with professional people, doing professional things, in a professional way? Well now you can! We're "**Your Company Name**" Property Management and we change the lives of Associates who join our firm. "**Your Company Name**" *was founded in Southern California in 1985 and has placed over 8000 tenants and represented over 3000 owner in the past 31 years. "Your Company Name", is a Debt Free company and has enhanced and perfected this remarkable property management system. As a regional force in its local market, "Your Company Name", is a recognized leader and is now expanding its concept nationally. We are looking for qualified individuals to join our firm.*

"**Your Company Name**" is committed to impacting the small residential property management industry in a positive way by providing innovative, automated, efficient and enhanced property management systems; a remarkable entrepreneurial opportunity is available to those with the passion, discipline and the desire to build a more balanced life.

"**Your Company Name**" is a seasoned X year company that is quiet but dynamic, created to manage single family homes, condos and small residential units. We brought this type of property management to the "front door" of the Real Estate Industry. Instead of operating it as a sideline business to Real Estate, it is our only business. When you do one thing, do it well and do it often, you not only get good at it, you get **GREAT** at you're your company's success is based on a simple concept using sophisticated, high-tech, innovative management systems that give owners and tenants a different standard of service than any other Property Management company provides.

**Requirements** We're looking for help from people with a mission. No experience is necessary because we'll teach you all you need to know. For locations in X city, Salary range is \$ X to -\$S/mnth. Real Estate License required.

**E-mail Resume to your e-mail**

## Sample Ad for CareerBuilder.com

[Click here](#) to download and customize your hiring ad.

**Description: Wanted:** Driven individuals with passion and heart, for a Property Management position.

Have you ever wished you could work with a professional company with professional people, doing professional things, in a professional way? Well, now you can! We are **"Your Company Name"** Property Management and we change the lives of Associates who join our firm.

**"Your Company Name"** is committed to impacting the small residential property management industry in a positive way by providing innovative, automated, efficient and enhanced property management systems. A remarkable entrepreneurial opportunity is available to those with the passion, discipline and the desire to build a more balanced life.

**"Your Company Name"** is a quiet, but dynamic company that manages single family homes, condos and smaller multi-family residential units. **"Your Company Name"** success is based on a simple concept, yet through the use of sophisticated, high-tech management systems, owners and tenants enjoy a different standard of service than any other Property Management company can provide.

### **Benefits at ("Your Company Name" )**

- Learn the latest in software and internet technology
- Learn how a business operates to become your own businessman or woman
- Job and Career Security. No layoffs in 25 years.
- Company is Debt FREE...
- Learn about Real Estate investments for your own portfolio
- Incentive Programs for bonuses on top of base salary
- Starting Salary range is \$X - \$X +/-month plus Bonuses (once you qualify)
- Medical and Retirement Benefits
- No ceiling on how high up you can go including owning your own **"Your Company Name"**, Property Management Franchise in future years. You control your future...

**Requirements:** We are looking for help from people with a mission. RE License is **required**, Property Management Experience, Prior personnel management, Must type at least 40 wpm and have basic knowledge of MS Office (Word, Excel, etc.). Need a clean DMV record. Must be a self-starter and self-disciplined.

### **Locations: "Your Company Name"**

#### History

**"Your Company Name"** was founded in Southern California in 1985. Over the past 25 years, **"Your Company Name"**, has enhanced and perfected this remarkable property management system. As a regional force in its local market, **"Your Company Name"**, is a recognized leader and is now expanding its concept nationally.

A busy Property Management Company located in **"Your Company City"**, is looking for a receptionist with a bubbly personality that can handle 10-line phones, professionally assisting a steady stream of walk in clients, and maintaining the office environment. Serious candidates need apply only.



## Sample Mailer to Agents for Employment

[Click here](#) to download and customize your ad.

**Position:** Leasing Consultant

**Legal Requirements:**

1. Real Estate License
2. Proof of vehicle insurance
3. Place company as additional insured on your vehicle
4. Valid driver's license
5. Must have a vehicle to go to properties to view and show

(You do not and cannot have prospects in your vehicle)

**Duties to be carried out:** See attached position contract

**Compensation, Etc:** See Below

- **Salary** - \$ X .00 Per Month
- **All Major Holidays are Paid**- Approximately 7
- **Hours** 8:00 am to 5:00pm
- **Car Usage:** Mileage paid

**After 90 days you qualify for:**

1. A Review of your Base Salary but increase is subject to management's discretion
2. Individual Bonus of \$250.00 is leasing goal is reached
3. General Business Bonus of \$250.00 is average rating for the team is 85% or higher
4. Medical Benefits company pays 55% of your personal premium (Family members can be added but it would be at your expense)
5. Dental Benefits company pays 25% of your personal premium (Family members can be added but it would be at your expense)
6. Retirement benefits company pays 1-3% of your total salary (It starts once you have earned \$ X or more)
7. You receive your birthday off with pay (Any day except on the 5th or 6th of the month)
8. Paid Vacations (1 week for years one and two of employment- 2 weeks per year for each subsequent year)
9. Company pays for any approved educational courses (Example is to get or to retain your Real Estate License courses or renewal. Being paid for your time to take the courses are not included)
10. Annual Bonus if Company reaches its goal. (Amount to be determined and varies from year to year)

**Beyond 90 days:**

- You will receive a 30 minute meeting once a month with management
- You will then receive an annual review 9 months from your 90 day review and then every 12 months thereafter
- Total compensation package if all terms are met can be approximately **\$X per year** including compensation and benefits.

## Phone Interview Questions

[Click here](#) to download and customize your questions

### Phone Interview Questions:

Name \_\_\_\_\_

1. Current Salary?
2. Reason for leaving current/ past job?
3. How many words per minute can you type?
4. Have you ever been convicted of a crime?
5. Computer Knowledge: How well versed are you in using MS office? Excellent, Good, Fair, Poor (for each)

Word, Excel, Power Point, Publisher, Outlook

1. Do you have a Real Estate License?
2. Do you have any Property Management Experience? If so, how many years
3. Medical Plan:
4. Phone Voice \_\_\_\_\_ Pleasant, Upbeat, Professional, etc.
5. Attitude \_\_\_\_\_ Pleasant, Upbeat, etc.
6. Did they view the website before the interview?
7. DMV Record (if applicable- have them bring a DMV printout)
8. Test & Credit check-more positives then negatives

Appt set for: \_\_\_\_\_

## Reference Checking Form

[Click here](#) to download the reference checking form

### Form - Reference Check Questionnaire

Candidate Information	
Candidate's Name: <input type="text"/>	Date of Application: <input type="text"/>
Position: <input type="text"/>	

Information About the Reference	
Name of Reference: <input type="text"/>	Date Contacted: <input type="text"/>
Company: <input type="text"/>	Phone Number: <input type="text"/>
Job Title: <input type="text"/>	Manager or Co-Worker: <input type="text"/>

Information from the Reference	
Candidate's Dates of Employment: <input type="text"/>	Candidate's Job Title: <input type="text"/>
Candidate's Reason for Leaving: <input type="text"/>	
Rate of Pay: <input type="text"/>	
Areas Where Training Needed: <input type="text"/>	
Quality of Work: <input type="text"/>	
General Comments: <input type="text"/>	

## Interview Questions & Evaluation Grid

[Click here](#) to download and customize your interview questions along with the Evaluation Grid

### Job Candidate Evaluation Grid

Candidate:	_____	Date:	_____
Position:	_____	Prepared by:	_____

EVALUATION FACTOR	EVALUATION POINTS			
Appearance	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/>
Attention	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/>
Experience (quantity)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/>
Experience (quality)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/>
Curiosity	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/>
Ambition	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/>
Stability	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/>
Innovation	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/>
Self-Management	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/>
Analytic Ability	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/>
Decision Making	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/>
“Beginner’s Mind”	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/>
References	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/>

Total Points:

Other Information and Observations:

## 2nd Interview Questions (if applicable)

[Click here](#) to download and customize your interview questions.

### Sample; 2nd Interview Questions (if applicable)

**Applicant Name:** \_\_\_\_\_ **Date** \_\_\_\_\_

**A second interview is normally for supervisors or management.**

**Q.** Walk me through a typical day at your last Job starting from when you left home.

(Looking for how detailed they are in their answers)

**Ans:**

**Q.** What does the work integrity mean to you?

(You're looking for the word honesty)

**Ans:**

**Q.** What are your short term Goals - Next Year's in two aspects-

1. Your growth within the company you will work for
2. Compensation exclusive of benefits

(What your wanting to see here is, do they have ambition and does what they are thinking in compensation match what the company can pay and afford?)

**Ans:**

**Q.** Considering the Jobs you've held; how would you evaluate your performance?

(What you're looking for here is it the same answer the 1st interviewer received)

**Ans:**

Q. What kinds of things would make you want to leave a job?

(What you're looking for here is it the same answer the 1st interviewer received)

Ans:

Q. Tell me what you like least about your relationship with your co-workers?

(What you're looking for here is it the same answer the 1st interviewer received)

Ans:

**Q.** What work Accomplishments makes you the proudest?

(What you're looking for here is it the same answer the 1st interviewer received)

**Ans:**

**Q.** How do you manage the fact that part of your income is based on bonuses? How does that make you feel? (What you are looking for is either that they are uncomfortable of not knowing what to expect or excited to take on the challenge.)

**Ans:**

**Q.** What questions do you have for me?

**Ans:**

**Q.** Here is what I expect:

1. Run the office as if you owned it

2. Deadlines must be met, if not notify in advance
3. Do what you say you'll do and when you say you'll do it and make sure the team does as well
4. Results in growth
5. Results in cutting cost

**Ans:**

**Q.** How would you feel in our weekly meeting if you're not hitting your marks? (You are looking for here is do they get nervous, embarrassed or do they dig in and want to figure it out)

**Ans:**

**Q.** Tell me how you have managed your time in the past and what office or computer tools you used to do it.

**Ans:**

**Q.** Have you ever memorized a script before? If so how did you feel about it?

**Ans:**

**Q.** What would make me believe you can sell prospective residents on our properties?

**Ans:**

Summary of Interview

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Next Step to take with applicant By When \_\_\_\_\_

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## Sample Thank You Letter for Attending Interview

[Click here](#) to download and customize your thank you letter.

### Sample

## Sample Thank You Letter for Attending Interview

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Dear \_\_\_\_\_,

Thank you for taking the time to come in and meet with me. I enjoyed our conversation, and appreciate your interest in "**Your Company**",

We interviewed a number of highly qualified applicants, and it's been a difficult decision. I am sorry that we won't be offering you the position, but we'll certainly keep your resume on file for the next six months in the event that another position becomes available.

We wish you the best in your employment search.

Sincerely,

## Sample letter-Thank you for submitting resume

[Click here](#) to download and customize your thank you letter.

### Sample

## Sample Letter-Thank you for submitting resume

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Dear \_\_\_\_\_

Thank you for your interest in "**Your Company**", We have reviewed your resume and, at this point, have found other candidates who more closely fit our needs.

We wish you the very best in your employment search.

Sincerely,

## Job Description Breakdowns

### 0-100 Doors

#### Owner Operator Plus One Staff

##### X Factors

- Geographically where your doors are located will affect # of property inspectors
- Age of properties
- Experience of each staff member

### Staff #1 (0-100 Doors)

#### Client Coordinator/Receptionist Job Description

- Stock copy machines, printers, etc.
- Keep lobby/office clean
- Take rents
- Put sales packages together & keep stocked
- Answer phones/multiple lines
- Direct traffic in lobby to appropriate place
- Keep office supplies stocked at work stations
- Keep forms stocked at work stations
- Filing/Scanning kept up to date
- Assemble marketing material

#### Leasing Job Description

- Take/field leasing calls
- Sit with walk in leasing prospects
- Pre-qualify leasing prospects
- Log calls, showings, applications into M1
- Schedule appointments with prospective residents to come into office
- Schedule appointments with prospective residents to view properties in the field
- Get applications
- Run credit, call on verifications and qualify applications
- Do Holding Deposit with resident

- Prep lease/move in package with resident
- Lease presentation with resident
- Schedule move in inspections for the property inspector with new resident move in
- Issue work order for lock change to be done prior to resident move in
- Do weekly leasing updates to owners via phone/email
- Meet targets & goals for applications and renting properties
- View inventory (inside/outside)- be at 85% at all times
- Ask for referrals at resident lease sign up
- Reports - daily, weekly, monthly
- Assist with answering phones
- Assist with taking rents
- Assist with greeting customers & directing traffic

### **Customer Service/Bookkeeping Job Description**

- Post rents
- Print and prep 3 days for Property Inspector
- Pull files and videos (if not in m1 software) for Property Inspector on back on markets
- Prep Security Deposit Disputes and then converse with Property Inspector
- Send monthly account statements to owners
- Follow monthly calendar
- Make address changes into system for owners, vendors, etc.
- Back on Markets
- Cut checks to owners, residents, vendors, etc.
- Collection of resident owes/late fees - weekly tracking, sending notices
- Closeout of account - statements/releases to owners, residents
- Daily deposit
- Eviction Updates to owners weekly
- Key board - update board as status' change
- Property kills - once rented, kill from rental list, etc.
- Lawn service - adding/canceling temporary and permanent service
- Market comps - CRA for back on markets
- New properties - enter into the system
- New leases/re-rents - enter new resident information into the system
- Notices of violations to residents from HOA's, etc.
- Pay Invoices weekly to vendors
- Retains on accounts - update retains
- Security deposits - breakdowns to residents, disputes, collections

- Sweep - paying Company weekly on commissions owed
- Utilities - turning on/off during vacancy
- Rent increase letters to owners - assist in making sure all are out on time
- Rent increase letters to residents - confirm all updated into computer once in
- Run rent receipts monthly
- Prep 3-day notices for late rents
- Take bookkeeping/customer calls from residents, owners, etc.
- Reports - daily & weekly reports
- Issue Emergency repairs if Property Inspector is not in the office
- Proof invoices with Property Inspector weekly

### **Staff #2 / Manager / Owner (0-100 Doors)**

#### **Property Inspector Job Description (Similar to a Property Manager)**

- Schedule signs due up
- Schedule Already rented signs to go up
- Schedule FWT (First Walk Thru) for owner/resident move outs
- Schedule Final walk thru
- Move in inspections with residents
- Move out inspections with residents
- Monthly exterior drive by inspections - view properties & audit log each month
- Annual inspections - inspect property, type up report to owner, issue work orders
- Violations to residents - send notices to residents & track for compliance
- Call owners for funds needed for repairs
- Work up job estimates after FWT (First Walk Thru)
- Issue work orders for rehab maintenance to vendors
- Work with vendors on coordinating work to get completed by deadline
- Monthly van service
- Van organized, stocked & clean at all times
- Post 3-Day notices
- Lockouts with sheriff on evictions
- Take photos of properties up for rent for website
- Make keys - log on invoice
- Issue general maintenance work orders on annuals
- Log & keep current inventory for signs & lockboxes

- Reports - daily, weekly, monthly
- Take all general maintenance requests from residents
- Take all general maintenance requests from residents
- Purge all work orders to be close out within 45 days of issue
- Follow up on all estimates to owners/residents/subs using default letter system
- Proof general maintenance invoices before payment
- Assist with security deposit disputes
- Schedule Annuals
- Post violations & follow up on them
- Post 24 hr notices
- Proof invoices with Accounting 20 minutes a week

### **New Accounts/Sales Job Description**

- Take/field new prospective owner calls
- Follow call procedure - follow up calls, website info, etc.
- Schedule appointments to meet prospective owners to sign up
- Do sales presentation with prospective owner and sign up account
- Real Estate office presentations - get referrals, build relationships
- New tract visits - get referrals, build relationships
- Deliver referral checks to real estate agents
- Assist in marketing campaign
- Work up CRA's for prospective owners
- Work up CRA's for current owners-assist
- Prep/send new sales info to prospective owners
- Reports - weekly & monthly

### **Human Resources Job Description**

- Place employment ads
- Field resumes
- Phone interviews with employee candidates
- Conduct preliminary interviews with employee candidates
- Check references for employee candidates
- Run credit, administer written & typing tests to employee candidates
- Schedule interviews for management with employee candidates
- Place vendor calls to prospective vendors
- Conduct phone interviews with prospective vendors
- Schedule interviews for management with prospective vendors
- Quality control on vendors
- Exit interviews with owners
- Exit interviews with residents
- New hire orientation for new employees

- Track employee training schedule, testing, re-testing, etc. for each division
- Administrative Assistant

### **Admin Duties**

- Business account receivables and payables
- Manage retirement plan
- Manage Health Care Plan
- Payroll
- Audit expense/cost cutting
- NMF (Network Marketing Fund) manage invoices and deposits
- Reconcile Blue and Gold trust accounts
- Manage workman's comp/liability insurance
- 1099's (annual project)
- Manage marketing campaigns
- Manage surveys - owners, residents, etc.

### **100-200 Doors**

Owner Operator & Two Staff

### **Staff #1 (100-200 Doors)**

#### **Client Coordinator/Receptionist Job Description**

- Stock copy machines, printers, etc.
- Keep lobby/office clean
- Take rents
- Put sales packages together & keep stocked
- Answer phones/multiple lines
- Direct traffic in lobby to appropriate place
- Keep office supplies stocked at work stations
- Keep forms stocked at work stations
- Filing/Scanning kept up to date
- Assemble marketing material

#### **Leasing Job Description**

- Take/field leasing calls
- Sit with walk in leasing prospects
- Pre-qualify leasing prospects
- Log calls, showings, applications into M1
- Schedule appointments with prospective residents to come into office



- Schedule appointments with prospective residents to view properties in the field
- Get applications
- Run credit, call on verifications and qualify applications
- Do Holding Deposit with resident
- Prep lease/move in package with resident
- Lease presentation with resident
- Schedule move in inspections for Property Inspector with new resident move in
- Issue work order for lock change to be done prior to resident move in
- Do weekly leasing updates to owners via phone/email
- Meet targets & goals for applications and renting properties
- View inventory (inside/outside)- be at 85% at all times
- Ask for referrals at resident lease sign up
- Reports - daily, weekly, monthly
- Assist with answering phones
- Assist with taking rents
- Assist with greeting customers & directing traffic

### **Customer Service/Bookkeeping Job Description**

- Send monthly account statements to owners
- Follow monthly calendar
- Make address changes into system for owners, vendors, etc.
- Back on Markets
- Cut checks to owners, residents, vendors, etc.
- Collection of resident owes/late fees - weekly tracking, sending notices
- Closeout of account - statements/releases to owners, residents
- Daily deposit
- Eviction Updates- update the owner weekly
- Key board - update board as status' change
- Property kills - once rented, kill from rental list, etc.
- Lawn service - adding/canceling temporary and permanent service
- Market comps - CRA for back on markets
- New properties - enter into the system
- New leases/re-rents - enter new resident information into the system
- Notices of violations to residents from HOA's, etc.
- Pay bills weekly to vendors
- Retains on accounts - update retains
- Security deposits - breakdowns to residents, disputes, collections
- Sweep - paying Company weekly on commissions owed

- Utilities - turning on/off during vacancy
- Rent increase letters to owners - assist in making sure all are out on time
- Rent increase letters to residents - confirm all updated into computer once in
- Run rent receipts monthly
- Prep 3-day notices for late rents
- Take accounting/customer calls from residents, owners, etc.
- Reports - daily & weekly reports
- Reports - daily, weekly, monthly
- Proof invoices with Property Inspector weekly

## **Staff #2 (100-200 Doors)**

### **Property Inspector Job Description (Similar to a Property Manager)**

- Schedule signs due up
- Schedule Already rented signs to go up
- Schedule FWT (First Walk Thru) for owner/resident move outs
- Schedule Final walk thru
- Move in inspections with residents
- Move out inspections with residents
- Monthly exterior drive by inspections - view properties & audit log each month
- Annual inspections - inspect property, type up report to owner, issue work orders
- Violations to residents - send notices to residents & track for compliance
- Call owners for funds needed for repairs
- Work up job estimates after FWT (First Walk Thru)
- Issue work orders for rehab maintenance to vendors
- Work with vendors on coordinating work to get completed by deadline
- Monthly van service
- Van organized, stocked & clean at all times
- Post 3-Day notices
- Lockouts with sheriff on evictions
- Take photos of properties up for rent for website
- Make keys - log on invoice
- Issue general maintenance work orders on annuals
- Log & keep current inventory for signs & lockboxes
- Reports - daily, weekly, monthly
- Take all general maintenance requests from residents
- Take all general maintenance requests from residents

- Purge all work orders to be close out within 45 days of issue
- Follow up on all estimates to owners/residents/subs using default letter system
- Proof general maintenance invoices before payment
- Assist with security deposit disputes
- Schedule Annuals
- Post violations & follow up on them
- Post 24 hr. notices
- Proof invoices with Accounting weekly

### **Staff #3/Manager/Owner (100-200 Doors)**

#### **New Accounts/Sales Job Description**

- Take/field new PIS calls
- Follow call procedure - follow up calls, website info, etc.
- Schedule appointments to meet prospective owners to sign up
- Do sales presentation with prospective owner and sign up account
- Real Estate office presentations - get referrals, build relationships
- New tract visits - get referrals, build relationships
- Deliver referral checks to real estate agents
- Assist in marketing campaign
- Work up CRA's for prospective owners
- Work up CRA's for current owners-assist
- Prep/send new sales info to prospective owners
- Reports - weekly & monthly

#### **Human Resources Job Description**

- Place employment ads
- Field resumes
- Phone interviews with employee candidates
- Conduct preliminary interviews with employee candidates
- Check references for employee candidates
- Run credit, administer written & typing tests to employee candidates
- Schedule interviews for management with employee candidates
- Place vendor calls to prospective vendors
- Conduct phone interviews with prospective vendors
- Schedule interviews for management with prospective vendors
- Quality control on vendors
- Exit interviews with owners
- Exit interviews with tenants
- New hire orientation for new employees

- Track employee training schedule, testing, re-testing, etc. for each division
- Administrative Assistant

### **Admin Duties**

- Business account receivables and payables
- Manage retirement plan
- Manage Health Care Plan
- Payroll
- Audit expense/cost cutting
- NMF (Network Marketing Fund) manage invoices and deposits
- Reconcile Blue and Gold trust accounts
- Manage workman's comp/liability insurance
- 1099's (annual project)
- Manage marketing campaigns
- Manage surveys - owners, residents, etc.

### **200-300 Doors**

Owner Operator & Three Staff

### **Staff #1 (200-300 Doors)**

#### **Client Coordinator/Receptionist Job Description**

- Stock copy machines, printers, etc.
- Keep lobby/office clean
- Take rents
- Put sales packages together & keep stocked
- Answer phones/multiple lines
- Direct traffic in lobby to appropriate place
- Keep office supplies stocked at work stations
- Keep forms stocked at work stations
- Filing/Scanning kept up to date
- Assemble marketing material

#### **Leasing Job Description**

- Take/field leasing calls
- Sit with walk in leasing prospects
- Pre-qualify leasing prospects
- Log calls, showings, applications into M1
- Schedule appointments with prospective residents to come into office

- Schedule appointments with prospective residents to view properties in the field
- Get applications
- Run credit, call on verifications and qualify applications
- Do Holding Deposit with resident
- Prep lease/move in package with resident
- Lease presentation with resident
- Schedule move in inspections for Property Inspector with new resident move in
- Issue work order for lock change to be done prior to resident move in
- Do weekly leasing updates to owners via phone/email
- Meet targets & goals for applications and renting properties
- View inventory (inside/outside)- be at 85% at all times
- Ask for referrals at resident lease sign up
- Reports - daily, weekly, monthly
- Assist with answering phones
- Assist with taking rents
- Assist with greeting customers & directing traffic

## **Staff #2 (200-300 Doors)**

### **Property Inspector Job Description (Similar to a Property Manager)**

- Schedule signs due up
- Schedule Already rented signs to go up
- Schedule FWT (First Walk Thru) for owner/resident move outs
- Schedule Final walk thru
- Move in inspections with residents
- Move out inspections with residents
- Monthly exterior driveby inspections - view properties & audit log each month
- Annual inspections - inspect property, type up report to owner, issue work orders
- Violations to residents - send notices to residents & track for compliance
- Call owners for funds needed for repairs
- Work up job estimates after FWT (First Walk Thru)
- Issue work orders for rehab maintenance to vendors
- Work with vendors on coordinating work to get completed by deadline
- Monthly van service
- Van organized, stocked & clean at all times
- Post 3-Day notices

- Lockouts with sheriff on evictions
- Take photos of properties up for rent for website
- Make keys - log on invoice
- Issue general maintenance work orders on annuals
- Log & keep current inventory for signs & lockboxes
- Reports - daily, weekly, monthly
- Take all general maintenance requests from residents
- Take all general maintenance requests from residents
- Purge all work orders to be close out within 45 days of issue
- Follow up on all estimates to owners/residents/subs using default letter system
- Proof general maintenance invoices before payment
- Assist with security deposit disputes
- Schedule Annuals
- Post violations & follow up on them
- Post 24 hr. notices
- Proof invoices with Accounting weekly

### **Staff #3 (200-300 Doors)**

#### **Customer Service/Bookkeeping Job Description**

- Send monthly account statements to owners
- Follow monthly calendar
- Make address changes into system for owners, vendors, etc.
- Back on Markets
- Cut checks to owners, residents, vendors, etc.
- Collection of resident owes/late fees - weekly tracking, sending notices
- Closeout of account - statements/releases to owners, residents
- Daily deposit
- Eviction Updates- update the owner weekly
- Key board - update board as status' change
- Property kills - once rented, kill from rental list, etc.
- Lawn service - adding/canceling temporary and permanent service
- Market comps - CRA for back on markets
- New properties - enter into the system
- New leases/re-rents - enter new resident information into the system
- Notices of violations to residents from HOA's, etc.
- Pay bills weekly to vendors
- Retains on accounts - update retains
- Security deposits - breakdowns to residents, disputes, collections
- Sweep - paying Company weekly on commission owed
- Utilities - turning on/off during vacancy

- Rent increase letters to owners - assist in making sure all are out on time
- Rent increase letters to residents - confirm all updated into computer once in
- Run rent receipts monthly
- Prep 3-day notices for late rents
- Take accounting/customer calls from residents, owners, etc.
- Reports - daily & weekly reports
- Reports - daily, weekly, monthly
- Proof invoices with Property Inspector weekly

### **(Optional) Staff (200-300 Doors)**

#### **New Accounts/Sales Job Description**

- Take/field new PIS calls
- Follow call procedure - follow up calls, website info, etc.
- Schedule appointments to meet prospective owners to sign up
- Do sales presentation with prospective owner and sign up account
- Real Estate office presentations - get referrals, build relationships
- New tract visits - get referrals, build relationships
- Deliver referral checks to real estate agents
- Assist in marketing campaign
- Work up CRA's for prospective owners
- Work up CRA's for current owners-assist
- Prep/send new sales info to prospective owners
- Reports - weekly & monthly

### **Staff #4/Manager/Owner (200-300 Doors)**

#### **New Accounts/Sales Job Description**

- Take/field new PIS calls
- Follow call procedure - follow up calls, website info, etc.
- Schedule appointments to meet prospective owners to sign up
- Do sales presentation with prospective owner and sign up account
- Real Estate office presentations - get referrals, build relationships
- New tract visits - get referrals, build relationships
- Deliver referral checks to real estate agents
- Assist in marketing campaign
- Work up CRA's for prospective owners
- Work up CRA's for current owners-assist
- Prep/send new sales info to prospective owners
- Reports - weekly & monthly

#### **Human Resources Job Description**

- Place employment ads
- Field resumes
- Phone interviews with employee candidates
- Conduct preliminary interviews with employee candidates
- Check references for employee candidates
- Run credit, administer written & typing tests to employee candidates
- Schedule interviews for management with employee candidates
- Place vendor calls to prospective vendors
- Conduct phone interviews with prospective vendors
- Schedule interviews for management with prospective vendors
- Quality control on vendors
- Exit interviews with owners
- Exit interviews with tenants
- New hire orientation for new employees
- Track employee training schedule, testing, re-testing, etc. for each division
- Administrative Assistant

### **Admin Duties**

- Business account receivables and payables
- Manage retirement plan
- Manage Health Care Plan
- Payroll
- Audit expense/cost cutting
- NMF(Network Marketing Fund) manage invoices and deposits
- Reconcile Blue and Gold trust accounts
- Manage workman's comp/liability insurance
- 1099's (annual project)
- Manage marketing campaigns
- Manage surveys - owners, residents, etc.

### **300-400 Doors**

Owner Operator & Four Staff

### **Staff #1 (300-400 Doors)**

#### **Client Coordinator/Receptionist Job Description**

- Stock copy machines, printers, etc.
- Keep lobby/office clean
- Take rents
- Put sales packages together & keep stocked
- Answer phones/multiple lines



- Direct traffic in lobby to appropriate place
- Keep office supplies stocked at work stations
- Keep forms stocked at work stations
- Filing/Scanning kept up to date
- Assemble marketing material
- Assist leasing in processing applications

## **Staff #2 (300-400 Doors)**

### **Leasing Job Description**

- Take/field leasing calls
- Sit with walk in leasing prospects
- Pre-qualify leasing prospects
- Log calls, showings, applications into M1
- Schedule appointments with prospective residents to come into office
- Schedule appointments with prospective residents to view properties in the field
- Check out keys to prospective residents
- Get applications
- Run credit, call on verifications and qualify applications
- Do Holding Deposit with resident
- Prep lease/move in package with resident
- Lease presentation with resident
- Schedule move in inspections for Property Inspector with new resident move in
- Issue work order for lock change to be done prior to resident move in
- Log prorated rents on new move ins
- Do weekly leasing updates to owners via phone/email
- Meet targets & goals for applications and renting properties
- View inventory (inside/outside)- be at 85% at all times
- Ask for referrals at resident lease sign up
- Assist with answering phones
- Assist with taking rents
- Assist with greeting customers & directing traffic

## **Staff #3 (300-400 Doors)**

### **Property Inspector Job Description (Similar to a Property Manager)**

- Schedule signs due up
- Schedule Already rented signs to go up
- Schedule FWT (First Walk Thru) for owner/resident move outs

- Schedule Final walk thru
- Move in inspections with residents
- Move out inspections with residents
- Monthly exterior drive by inspections - view properties & audit log each month
- Annual inspections - inspect property, type up report to owner, issue work orders
- Violations to residents - send notices to residents & track for compliance
- Call owners for funds needed for repairs
- Work up job estimates after FWT (First Walk Thru)
- Issue work orders for rehab maintenance to vendors
- Work with vendors on coordinating work to get completed by deadline
- Monthly van service
- Van organized, stocked & clean at all times
- Post 3-Day notices
- Lockouts with sheriff on evictions
- Take photos of properties up for rent for website
- Make keys - log on invoice
- Issue general maintenance work orders on annuals
- Log & keep current inventory for signs & lockboxes
- Reports - daily, weekly, monthly
- Take all general maintenance requests from residents
- Take all general maintenance requests from residents
- Purge all work orders to be close out within 45 days of issue
- Follow up on all estimates to owners/residents/subs using default letter system
- Proof general maintenance invoices before payment
- Assist with security deposit disputes
- Schedule Annuals
- Post violations & follow up on them
- Post 24 hr. notices
- Proof invoices with Accounting weekly

#### **Staff #4 (300-400 Doors)**

##### **Customer Service/Bookkeeping Job Description**

- Post rents
- Print and prep 3 days for Property Inspector
- Pull files and videos ( if not in m1 software) for Property Inspector for back on markets
- Prep Security Deposit Disputes and then converse with Property Inspector

- Send monthly account statements to owners
- Follow monthly calendar
- Make address changes into system for owners, vendors, etc.
- Back on Markets
- Cut checks to owners, residents, vendors, etc.
- Collection of resident owes/late fees - weekly tracking, sending notices
- Closeout of account - statements/releases to owners, residents
- Daily deposit
- Eviction Updates- update the owner weekly
- Key board - update board as status' change
- Property kills - once rented, kill from rental list, etc.
- Lawn service - adding/canceling temporary and permanent service
- Market comps - CRA for back on markets
- New properties - enter into the system
- New leases/re-rents - enter new resident information into the system
- Notices of violations to residents from HOA's, etc.
- Pay Invoices weekly to vendors
- Retains on accounts - update retains
- Security deposits - breakdowns to residents, disputes, collections
- Sweep - paying Management One weekly on commission owed
- Utilities - turning on/off during vacancy
- Rent increase letters to owners - assist in making sure all are out on time
- Rent increase letters to residents - confirm all updated into computer once in
- Run rent receipts monthly
- Prep 3-day notices for late rents
- Take bookkeeping/customer calls from residents, owners, etc.
- Reports - daily & weekly reports
- Issue Emergency repairs if Property Inspector is not in the office
- Proof invoices with Property Inspector weekly

### **(Optional) Staff (300-400 Doors)**

#### **New Accounts/Sales Job Description**

- Take/field new PIS calls
- Follow call procedure - follow up calls, website info, etc.
- Schedule appointments to meet prospective owners to sign up
- Do sales presentation with prospective owner and sign up account
- Real Estate office presentations - get referrals, build relationships
- New tract visits - get referrals, build relationships
- Deliver referral checks to real estate agents

- Assist in marketing campaign
- Work up CRA's for prospective owners
- Work up CRA's for current owners-assist
- Prep/send new sales info to prospective owners
- Reports - weekly & monthly

## **Staff #5/Manager/Owner (300-400 Doors)**

### **New Accounts/Sales Job Description**

- Take/field new PIS calls
- Follow call procedure - follow up calls, website info, etc.
- Schedule appointments to meet prospective owners to sign up
- Do sales presentation with prospective owner and sign up account
- Real Estate office presentations - get referrals, build relationships
- New tract visits - get referrals, build relationships
- Deliver referral checks to real estate agents
- Assist in marketing campaign
- Work up CRA's for prospective owners
- Work up CRA's for current owners-assist
- Prep/send new sales info to prospective owners
- Reports - weekly & monthly

### **Human Resources Job Description**

- Place employment ads
- Field resumes
- Phone interviews with employee candidates
- Conduct preliminary interviews with employee candidates
- Check references for employee candidates
- Run credit, administer written & typing tests to employee candidates
- Schedule interviews for management with employee candidates
- Place vendor calls to prospective vendors
- Conduct phone interviews with prospective vendors
- Schedule interviews for management with prospective vendors
- Quality control on vendors
- Exit interviews with owners
- Exit interviews with tenants
- New hire orientation for new employees
- Track employee training schedule, testing, re-testing, etc. for each division
- Administrative Assistant

### **Admin Duties**

- Business account receivables and payables
- Manage retirement plan
- Manage Health Care Plan
- Payroll
- Audit expense/cost cutting
- NMF (Network Marketing Fund) invoices and deposits
- Reconcile Blue and Gold trust accounts
- Manage workman's comp/liability insurance
- 1099's (annual project)
- Manage marketing campaigns
- Manage surveys - owners, residents, etc.

### **400-500 Doors**

Owner Operator & 5 Staff

#### **Staff #1 (400-500 Doors)**

##### **Client Coordinator/Receptionist Job Description**

- Stock copy machines, printers, etc.
- Keep lobby/office clean
- Take rents
- Put sales packages together & keep stocked
- Answer phones/multiple lines
- Direct traffic in lobby to appropriate place
- Keep office supplies stocked at work stations
- Keep forms stocked at work stations
- Filing/Scanning kept up to date
- Assemble marketing material
- Assist leasing in processing applications

#### **Staff #2 (400-500 Doors)**

##### **Leasing Job Description**

- Take/field leasing calls
- Sit with walk in leasing prospects
- Pre-qualify leasing prospects
- Log calls, showings, applications into M1
- Schedule appointments with prospective residents to come into office
- Schedule appointments with prospective residents to view properties in the field
- Check out keys to prospective residents
- Get applications

- Run credit, call on verifications and qualify applications
- Do Holding Deposit with resident
- Prep lease/move in package with resident
- Lease presentation with resident
- Schedule move in inspections for Property Inspector with new resident move in
- Issue work order for lock change to be done prior to resident move in
- Log prorated rents on new move ins
- Do weekly leasing updates to owners via phone/email
- Meet targets & goals for applications and renting properties
- View inventory (inside/outside)- be at 85% at all times
- Ask for referrals at resident lease sign up
- Assist with answering phones
- Assist with taking rents
- Assist with greeting customers & directing traffic

### **Staff #3 (400-500 Doors)**

#### **Property Inspector Job Description (Similar to a Property Manager)**

- Schedule signs due up
- Schedule Already rented signs to go up
- Schedule FWT (First Walk Thru) for owner/resident move outs
- Schedule Final walk thru
- Move in inspections with residents
- Move out inspections with residents
- Monthly exterior drive by inspections - view properties & audit log each month
- Annual inspections - inspect property, type up report to owner, issue work orders
- Violations to residents - send notices to residents & track for compliance
- Call owners for funds needed for repairs
- Work up job estimates after FWT (First Walk Thru)
- Issue work orders for rehab maintenance to vendors
- Work with vendors on coordinating work to get completed by deadline
- Monthly van service
- Van organized, stocked & clean at all times
- Post 3-Day notices
- Lockouts with sheriff on evictions
- Take photos of properties up for rent for website
- Make keys - log on invoice

- Issue general maintenance work orders on annuals
- Log & keep current inventory for signs & lockboxes
- Reports - daily, weekly, monthly
- Take all general maintenance requests from residents
- Take all general maintenance requests from residents
- Purge all work orders to be close out within 45 days of issue
- Follow up on all estimates to owners/residents/subs using default letter system
- Proof general maintenance invoices before payment
- Assist with security deposit disputes
- Schedule Annuals
- Post violations & follow up on them
- Post 24 hr. notices
- Proof invoices with Accounting weekly

#### **Staff #4 (400-500 Doors)**

##### **Customer Service/Bookkeeping Job Description**

- Post rents
- Print and prep 3 days for Property Inspector
- Pull files and videos ( if not in m1 software) for Property Inspector on back on markets
- Prep Security Deposit Disputes and then converse with Property Inspector
- Send monthly account statements to owners
- Follow monthly calendar
- Make address changes into system for owners, vendors, etc.
- Back on Markets
- Cut checks to owners, residents, vendors, etc.
- Collection of resident owes/late fees - weekly tracking, sending notices
- Closeout of account - statements/releases to owners, residents
- Daily deposit
- Eviction Updates- update the owner weekly
- Key board - update board as status' change
- Property kills - once rented, kill from rental list, etc.
- Lawn service - adding/canceling temporary and permanent service
- Market comps - CRA for back on markets
- New properties - enter into the system
- New leases/re-rents - enter new resident information into the system
- Notices of violations to residents from HOA's, etc.
- Pay Invoices weekly to vendors
- Retains on accounts - update retains

- Security deposits - breakdowns to residents, disputes, collections
- Sweep - paying Company weekly on commission owed
- Utilities - turning on/off during vacancy
- Rent increase letters to owners - assist in making sure all are out on time
- Rent increase letters to residents - confirm all updated into computer once in
- Run rent receipts monthly
- Prep 3-day notices for late rents
- Take bookkeeping/customer calls from residents, owners, etc.
- Reports - daily & weekly reports
- Issue Emergency repairs if Property Inspector is not in the office
- Proof invoices with Property Inspector weekly

### **Staff #5 (400-500 Doors)**

#### **Property Inspector Job Description (Similar to a Property Manager)**

- Schedule signs due up
- Schedule Already rented signs to go up
- Schedule FWT (First Walk Thru) for owner/resident move outs
- Schedule Final walk thru
- Move in inspections with residents
- Move out inspections with residents
- Monthly exterior drive by inspections - view properties & audit log each month
- Annual inspections - inspect property, type up report to owner, issue work orders
- Violations to residents - send notices to residents & track for compliance
- Call owners for funds needed for repairs
- Work up job estimates after FWT (First Walk Thru)
- Issue work orders for rehab maintenance to vendors
- Work with vendors on coordinating work to get completed by deadline
- Monthly van service
- Van organized, stocked & clean at all times
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- Take photos of properties up for rent for website
- Make keys - log on invoice
- Issue general maintenance work orders on annuals
- Log & keep current inventory for signs & lockboxes
- Reports - daily, weekly, monthly



- Take all general maintenance requests from residents
- Take all general maintenance requests from residents
- Purge all work orders to be close out within 45 days of issue
- Follow up on all estimates to owners/residents/subs using default letter system
- Proof general maintenance invoices before payment
- Assist with security deposit disputes
- Schedule Annuals
- Post violations & follow up on them
- Post 24 hr. notices
- Proof invoices with Accounting weekly

### **(Optional) Staff (400-500 Doors)**

#### **New Accounts/Sales Job Description**

- Take/field new PIS calls
- Follow call procedure - follow up calls, website info, etc.
- Schedule appointments to meet prospective owners to sign up
- Do sales presentation with prospective owner and sign up account
- Real Estate office presentations - get referrals, build relationships
- New tract visits - get referrals, build relationships
- Deliver referral checks to real estate agents
- Assist in marketing campaign
- Work up CRA's for prospective owners
- Work up CRA's for current owners-assist
- Prep/send new sales info to prospective owners
- Reports - weekly & monthly

### **Staff #6/Manager/Owner (400-500 Doors)**

#### **New Accounts/Sales Job Description**

- Take/field new PIS calls
- Follow call procedure - follow up calls, website info, etc.
- Schedule appointments to meet prospective owners to sign up
- Do sales presentation with prospective owner and sign up account
- Real Estate office presentations - get referrals, build relationships
- New tract visits - get referrals, build relationships
- Deliver referral checks to real estate agents
- Assist in marketing campaign
- Work up CRA's for prospective owners
- Work up CRA's for current owners-assist
- Prep/send new sales info to prospective owners
- Reports - weekly & monthly

## **Human Resources Job Description**

- Place employment ads
- Field resumes
- Phone interviews with employee candidates
- Conduct preliminary interviews with employee candidates
- Check references for employee candidates
- Run credit, administer written & typing tests to employee candidates
- Schedule interviews for management with employee candidates
- Place vendor calls to prospective vendors
- Conduct phone interviews with prospective vendors
- Schedule interviews for management with prospective vendors
- Quality control on vendors
- Exit interviews with owners
- Exit interviews with residents
- New hire orientation for new employees
- Track employee training schedule, testing, re-testing, etc. for each division
- Administrative Assistant

## **Admin Duties**

- Business account receivables and payables
- Manage retirement plan
- Manage Health Care Plan
- Payroll
- Audit expense/cost cutting
- NMF (Network Marketing Fund) manage invoices and deposits
- Reconcile Blue and Gold trust accounts
- Manage workman's comp/liability insurance
- 1099's (annual project)
- Manage marketing campaigns
- Manage surveys - owners, residents, etc.

## **500-600 Doors**

Owner Operator and 6 Staff

### **Staff #1 (500-600 Doors)**

## **Client Coordinator/Receptionist Job Description**

- Stock copy machines, printers, etc.
- Keep lobby/office clean
- Take rents

- Put sales packages together & keep stocked
- Answer phones/multiple lines
- Direct traffic in lobby to appropriate place
- Keep office supplies stocked at work stations
- Keep forms stocked at work stations
- Filing/Scanning kept up to date
- Assemble marketing material
- Assist leasing in processing applications

## **Staff #2 (500-600 Doors)**

### **Leasing Job Description**

- Take/field leasing calls
- Sit with walk in leasing prospects
- Pre-qualify leasing prospects
- Log calls, showings, applications into M1
- Schedule appointments with prospective residents to come into office
- Schedule appointments with prospective residents to view properties in the field
- Check out keys to prospective residents
- Get applications
- Run credit, call on verifications and qualify applications
- Do Holding Deposit with resident
- Prep lease/move in package with resident
- Lease presentation with resident
- Schedule move in inspections for Property Inspector with new resident move in
- Issue work order for lock change to be done prior to resident move in
- Log prorated rents on new move ins
- Do weekly leasing updates to owners via phone/email
- Meet targets & goals for applications and renting properties
- View inventory (inside/outside)- be at 85% at all times
- Ask for referrals at resident lease sign up
- Assist with answering phones
- Assist with taking rents
- Assist with greeting customers & directing traffic

## **Staff #3 (500-600 Doors)**

### **Property Inspector Job Description (Similar to a Property Manager)**

- Schedule signs due up

- Schedule Already rented signs to go up
- Schedule FWT (First Walk Thru) for owner/resident move outs
- Schedule Final walk thru
- Move in inspections with residents
- Move out inspections with residents
- Monthly exterior drive by inspections - view properties & audit log each month
- Annual inspections - inspect property, type up report to owner, issue work orders
- Violations to residents - send notices to residents & track for compliance
- Call owners for funds needed for repairs
- Work up job estimates after FWT (First Walk Thru)
- Issue work orders for rehab maintenance to vendors
- Work with vendors on coordinating work to get completed by deadline
- Monthly van service
- Van organized, stocked & clean at all times
- Post 3-Day notices
- Lockouts with sheriff on evictions
- Take photos of properties up for rent for website
- Make keys - log on invoice
- Issue general maintenance work orders on annuals
- Log & keep current inventory for signs & lockboxes
- Reports - daily, weekly, monthly
- Take all general maintenance requests from residents
- Take all general maintenance requests from residents
- Purge all work orders to be close out within 45 days of issue
- Follow up on all estimates to owners/residents/subs using default letter system
- Proof general maintenance invoices before payment
- Assist with security deposit disputes
- Schedule Annuals
- Post violations & follow up on them
- Post 24 hr. notices
- Proof invoices with Accounting weekly

#### **Staff #4 (500-600 Doors)**

##### **Customer Service/Bookkeeping Job Description**

- Post rents
- Print and prep 3 days for Property Inspector
- Pull files and videos ( if not in m1 software) for Property Inspector on back on markets

- Prep Security Deposit Disputes and then converse with Property Inspector
- Send monthly account statements to owners
- Follow monthly calendar
- Make address changes into system for owners, vendors, etc.
- Back on Markets
- Cut checks to owners, residents, vendors, etc.
- Collection of resident owes/late fees - weekly tracking, sending notices
- Closeout of account - statements/releases to owners, residents
- Daily deposit
- Eviction Updates- update the owner weekly
- Key board - update board as status' change
- Property kills - once rented, kill from rental list, etc.
- Lawn service - adding/canceling temporary and permanent service
- Market comps - CRA for back on markets
- New properties - enter into the system
- New leases/re-rents - enter new resident information into the system
- Notices of violations to residents from HOA's, etc.
- Pay Invoices weekly to vendors
- Retains on accounts - update retains
- Security deposits - breakdowns to residents, disputes, collections
- Sweep - paying Company weekly on commission owed
- Utilities - turning on/off during vacancy
- Rent increase letters to owners - assist in making sure all are out on time
- Rent increase letters to residents - confirm all updated into computer once in
- Run rent receipts monthly
- Prep 3-day notices for late rents
- Take bookkeeping/customer calls from residents, owners, etc.
- Reports - daily & weekly reports
- Issue Emergency repairs if Property Inspector is not in the office
- Proof invoices with Property Inspector weekly

### **Staff #5 (500-600 Doors)**

#### **# 2 - Property Inspector Job Description (Similar to a Property Manager)**

- Schedule signs due up
- Schedule Already rented signs to go up
- Schedule FWT (First Walk Thru) for owner/resident move outs
- Schedule Final walk thru

- Move in inspections with residents
- Move out inspections with residents
- Monthly exterior drive by inspections - view properties & audit log each month
- Annual inspections - inspect property, type up report to owner, issue work orders
- Violations to residents - send notices to residents & track for compliance
- Call owners for funds needed for repairs
- Work up job estimates after FWT (First Walk Thru)
- Issue work orders for rehab maintenance to vendors
- Work with vendors on coordinating work to get completed by deadline
- Monthly van service
- Van organized, stocked & clean at all times
- Post 3-Day notices
- Lockouts with sheriff on evictions
- Take photos of properties up for rent for website
- Make keys - log on invoice
- Issue general maintenance work orders on annuals
- Log & keep current inventory for signs & lockboxes
- Reports - daily, weekly, monthly
- Take all general maintenance requests from residents
- Take all general maintenance requests from residents
- Purge all work orders to be close out within 45 days of issue
- Follow up on all estimates to owners/residents/subs using default letter system
- Proof general maintenance invoices before payment
- Assist with security deposit disputes
- Schedule Annuals
- Post violations & follow up on them
- Post 24 hr. notices
- Proof invoices with Accounting weekly

### **Staff #6/Manager (500-600 Doors)**

**Manager - responsible for managing office and generating new accounts**

#### **New Accounts/Sales Job Description**

- Take/field new PIS calls
- Follow call procedure - follow up calls, website info, etc.
- Schedule appointments to meet prospective owners to sign up
- Do sales presentation with prospective owner and sign up account

- Real Estate office presentations - get referrals, build relationships
- New tract visits - get referrals, build relationships
- Deliver referral checks to real estate agents
- Assist in marketing campaign
- Work up CRA's for prospective owners
- Work up CRA's for current owners-assist
- Prep/send new sales info to prospective owners
- Reports - weekly & monthly

### **Manager Job Description**

- Oversee each division and verify daily, weekly & monthly reports are ran/accurate
- Assist with customer complaints

### **Human Resources Job Description**

- Place employment ads
- Field resumes
- Phone interviews with employee candidates
- Conduct preliminary interviews with employee candidates
- Check references for employee candidates
- Run credit, administer written & typing tests to employee candidates
- Schedule interviews for management with employee candidates
- Place vendor calls to prospective vendors
- Conduct phone interviews with prospective vendors
- Schedule interviews for management with prospective vendors
- Quality control on vendors
- Exit interviews with owners
- Exit interviews with residents
- New hire orientation for new employees
- Track employee training schedule, testing, re-testing, etc. for each division

### **Marketing**

- Assist in 12-month marketing campaign

## **(Optional) Staff (500-600 Doors)**

### **New Accounts/Sales Job Description**

- Take/field new PIS calls
- Follow call procedure - follow up calls, website info, etc.
- Schedule appointments to meet prospective owners to sign up
- Do sales presentation with prospective owner and sign up account
- Real Estate office presentations - get referrals, build relationships
- New tract visits - get referrals, build relationships
- Deliver referral checks to real estate agents
- Assist in marketing campaign
- Work up CRA's for prospective owners
- Work up CRA's for current owners-assist
- Prep/send new sales info to prospective owners
- Reports - weekly & monthly

## **Owner (500-600 Doors)**

### **Admin Duties**

- Business account receivables and payables
- Manage retirement plan
- Manage Health Care Plan
- Payroll
- Audit expense/cost cutting
- NMF (Network Marketing Fund) manage invoices and deposits
- Reconcile Blue and Gold trust accounts
- Manage workman's comp/liability insurance
- 1099's (annual project)
- Manage marketing campaigns
- Manage surveys - owners, residents, etc.
- Set out all Marketing Campaigns

## **600-700 Doors**

Owner Operator & Seven Staff

### **Staff #1 (600-700 Doors)**

#### **Client Coordinator/Receptionist Job Description**

- Stock copy machines, printers, etc.
- Keep lobby/office clean
- Take rents
- Put sales packages together & keep stocked
- Answer phones/multiple lines



- Direct traffic in lobby to appropriate place
- Keep office supplies stocked at work stations
- Keep forms stocked at work stations
- Filing/Scanning kept up to date
- Assemble marketing material
- Assist leasing in processing applications

## **Staff #2 (600-700 Doors)**

### **Leasing Job Description**

- Take/field leasing calls
- Sit with walk in leasing prospects
- Pre-qualify leasing prospects
- Log calls, showings, applications into M1
- Schedule appointments with prospective residents to come into office
- Schedule appointments with prospective residents to view properties in the field
- Check out keys to prospective residents
- Get applications
- Run credit, call on verifications and qualify applications
- Do Holding Deposit with resident
- Prep lease/move in package with resident
- Lease presentation with resident
- Schedule move in inspections for Property Inspector with new resident move in
- Issue work order for lock change to be done prior to resident move in
- Log prorated rents on new move ins
- Do weekly leasing updates to owners via phone/email
- Meet targets & goals for applications and renting properties
- View inventory (inside/outside)- be at 85% at all times
- Ask for referrals at resident lease sign up
- Assist with answering phones
- Assist with taking rents
- Assist with greeting customers & directing traffic

## **Staff #3 (600-700 Doors)**

### **Property Inspector Job Description (Similar to a Property Manager)**

- Schedule signs due up
- Schedule Already rented signs to go up
- Schedule FWT (First Walk Thru) for owner/resident move outs

- Schedule Final walk thru
- Move in inspections with residents
- Move out inspections with residents
- Monthly exterior drive by inspections - view properties & audit log each month
- Annual inspections - inspect property, type up report to owner, issue work orders
- Violations to residents - send notices to residents & track for compliance
- Call owners for funds needed for repairs
- Work up job estimates after FWT (First Walk Thru)
- Issue work orders for rehab maintenance to vendors
- Work with vendors on coordinating work to get completed by deadline
- Monthly van service
- Van organized, stocked & clean at all times
- Post 3-Day notices
- Lockouts with sheriff on evictions
- Take photos of properties up for rent for website
- Make keys - log on invoice
- Issue general maintenance work orders on annuals
- Log & keep current inventory for signs & lockboxes
- Reports - daily, weekly, monthly
- Take all general maintenance requests from residents
- Take all general maintenance requests from residents
- Purge all work orders to be close out within 45 days of issue
- Follow up on all estimates to owners/residents/subs using default letter system
- Proof general maintenance invoices before payment
- Assist with security deposit disputes
- Schedule Annuals
- Post violations & follow up on them
- Post 24 hr. notices
- Proof invoices with Accounting weekly

#### **Staff #4 (600-700 Doors)**

##### **Customer Service/Bookkeeping Job Description**

- Post rents
- Print and prep 3 days for Property Inspector
- Pull files and videos ( if not in m1 software) for Property Inspector on back on markets
- Prep Security Deposit Disputes and then converse with Property Inspector

- Send monthly account statements to owners
- Follow monthly calendar
- Make address changes into system for owners, vendors, etc.
- Back on Markets
- Cut checks to owners, residents, vendors, etc.
- Collection of resident owes/late fees - weekly tracking, sending notices
- Closeout of account - statements/releases to owners, residents
- Daily deposit
- Eviction Updates- update the owner weekly
- Key board - update board as status' change
- Property kills - once rented, kill from rental list, etc.
- Lawn service - adding/canceling temporary and permanent service
- Market comps - CRA for back on markets
- New properties - enter into the system
- New leases/re-rents - enter new resident information into the system
- Notices of violations to residents from HOA's, etc.
- Pay Invoices weekly to vendors
- Retains on accounts - update retains
- Security deposits - breakdowns to residents, disputes, collections
- Sweep - paying Company weekly on commission owed
- Utilities - turning on/off during vacancy
- Rent increase letters to owners - assist in making sure all are out on time
- Rent increase letters to residents - confirm all updated into computer once in
- Run rent receipts monthly
- Prep 3-day notices for late rents
- Take bookkeeping/customer calls from residents, owners, etc.
- Reports - daily & weekly reports
- Issue Emergency repairs if Property Inspector is not in the office
- Proof invoices with Property Inspector weekly

### **Staff #5 (600-700 Doors)**

#### **# 2 - Property Inspector Job Description (Similar to a Property Manager)**

- Schedule signs due up
- Schedule Already rented signs to go up
- Schedule FWT (First Walk Thru) for owner/resident move outs
- Schedule Final walk thru
- Move in inspections with residents
- Move out inspections with residents

- Monthly exterior drive by inspections - view properties & audit log each month
- Annual inspections - inspect property, type up report to owner, issue work orders
- Violations to residents - send notices to residents & track for compliance
- Call owners for funds needed for repairs
- Work up job estimates after FWT (First Walk Thru)
- Issue work orders for rehab maintenance to vendors
- Work with vendors on coordinating work to get completed by deadline
- Monthly van service
- Van organized, stocked & clean at all times
- Post 3-Day notices
- Lockouts with sheriff on evictions
- Take photos of properties up for rent for website
- Make keys - log on invoice
- Issue general maintenance work orders on annuals
- Log & keep current inventory for signs & lockboxes
- Reports - daily, weekly, monthly
- Take all general maintenance requests from residents
- Take all general maintenance requests from residents
- Purge all work orders to be close out within 45 days of issue
- Follow up on all estimates to owners/residents/subs using default letter system
- Proof general maintenance invoices before payment
- Assist with security deposit disputes
- Schedule Annuals
- Post violations & follow up on them
- Post 24 hr. notices
- Proof invoices with Accounting weekly

### **Staff #6 / Manager (600-700 Doors)**

**Manager - responsible for managing office and generating new accounts**

#### **New Accounts/Sales Job Description**

- Take/field new PIS calls
- Follow call procedure - follow up calls, website info, etc.
- Schedule appointments to meet prospective owners to sign up
- Do sales presentation with prospective owner and sign up account
- Real Estate office presentations - get referrals, build relationships
- New tract visits - get referrals, build relationships

- Deliver referral checks to real estate agents
- Assist in marketing campaign
- Work up CRA's for prospective owners
- Work up CRA's for current owners-assist
- Prep/send new sales info to prospective owners
- Reports - weekly & monthly

### **Manager Job Description**

- Oversee each division and verify daily, weekly & monthly reports are ran/accurate
- Assist with customer complaints

### **Human Resources Job Description**

- Place employment ads
- Field resumes
- Phone interviews with employee candidates
- Conduct preliminary interviews with employee candidates
- Check references for employee candidates
- Run credit, administer written & typing tests to employee candidates
- Schedule interviews for management with employee candidates
- Place vendor calls to prospective vendors
- Conduct phone interviews with prospective vendors
- Schedule interviews for management with prospective vendors
- Quality control on vendors
- Exit interviews with owners
- Exit interviews with residents
- New hire orientation for new employees
- Track employee training schedule, testing, re-testing, etc. for each division
- Administrative Assistant

### **Marketing**

- Assist in 12-month marketing campaign

## **Staff #7 (600-700 Doors)**

### **# 2 Leasing Job Description**

- Take/field leasing calls
- Sit with walk in leasing prospects
- Pre-qualify leasing prospects
- Log calls, showings, applications into M1
- Schedule appointments with prospective residents to come into office
- Schedule appointments with prospective residents to view properties in the field
- Check out keys to prospective residents
- Get applications
- Run credit, call on verifications and qualify applications
- Do Holding Deposit with resident
- Prep lease/move in package with resident
- Lease presentation with resident
- Schedule move in inspections for Property Inspector with new resident move in
- Issue work order for lock change to be done prior to resident move in
- Log prorated rents on new move ins
- Do weekly leasing updates to owners via phone/email
- Meet targets & goals for applications and renting properties
- View inventory (inside/outside)- be at 85% at all times
- Ask for referrals at resident lease sign up
- Assist with answering phones
- Assist with taking rents
- Assist with greeting customers & directing traffic

## **(Optional) Staff (600-700 Doors)**

### **New Accounts/Sales Job Description**

- Take/field new PIS calls
- Follow call procedure - follow up calls, website info, etc.
- Schedule appointments to meet prospective owners to sign up
- Do sales presentation with prospective owner and sign up account
- Real Estate office presentations - get referrals, build relationships
- New tract visits - get referrals, build relationships
- Deliver referral checks to real estate agents
- Assist in marketing campaign
- Work up CRA's for prospective owners
- Work up CRA's for current owners-assist
- Prep/send new sales info to prospective owners

- Reports - weekly & monthly

## **Owner (600-700 Doors) (Copy)**

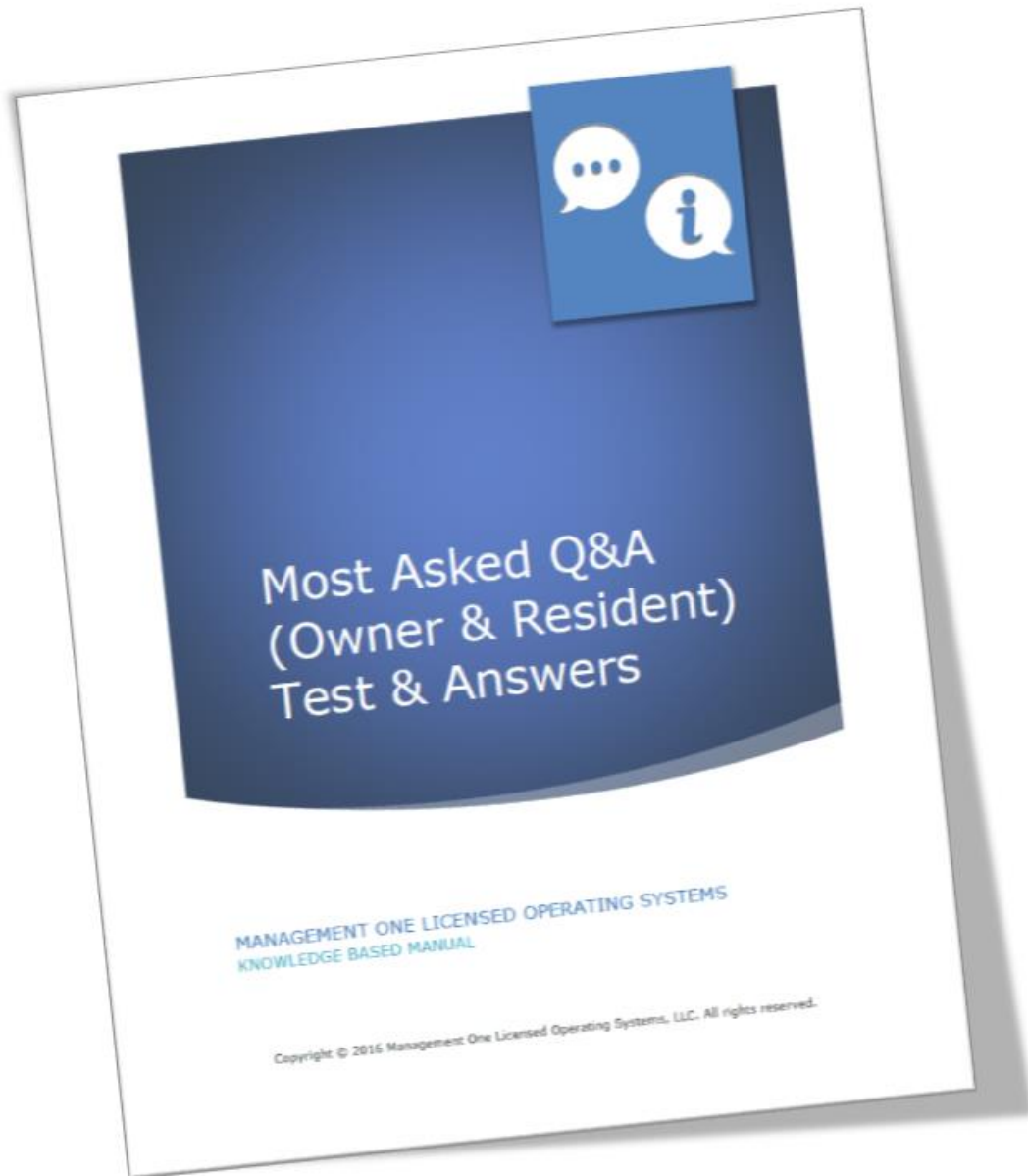
### **Admin Duties**

- Business account receivables and payables
- Manage retirement plan
- Manage Health Care Plan
- Payroll
- Audit expense/cost cutting
- NMF (Network Marketing Fund) manage invoices and deposits
- Reconcile Blue and Gold trust accounts
- Manage workman's comp/liability insurance
- 1099's (annual project)
- Manage marketing campaigns
- Manage surveys - owners, residents, etc.

## Most Asked Q&A's Test & Answers (Owner & Resident)

[Click Here to Download MS Word .docx file](#)

**Test- Most Asked Q&A's**





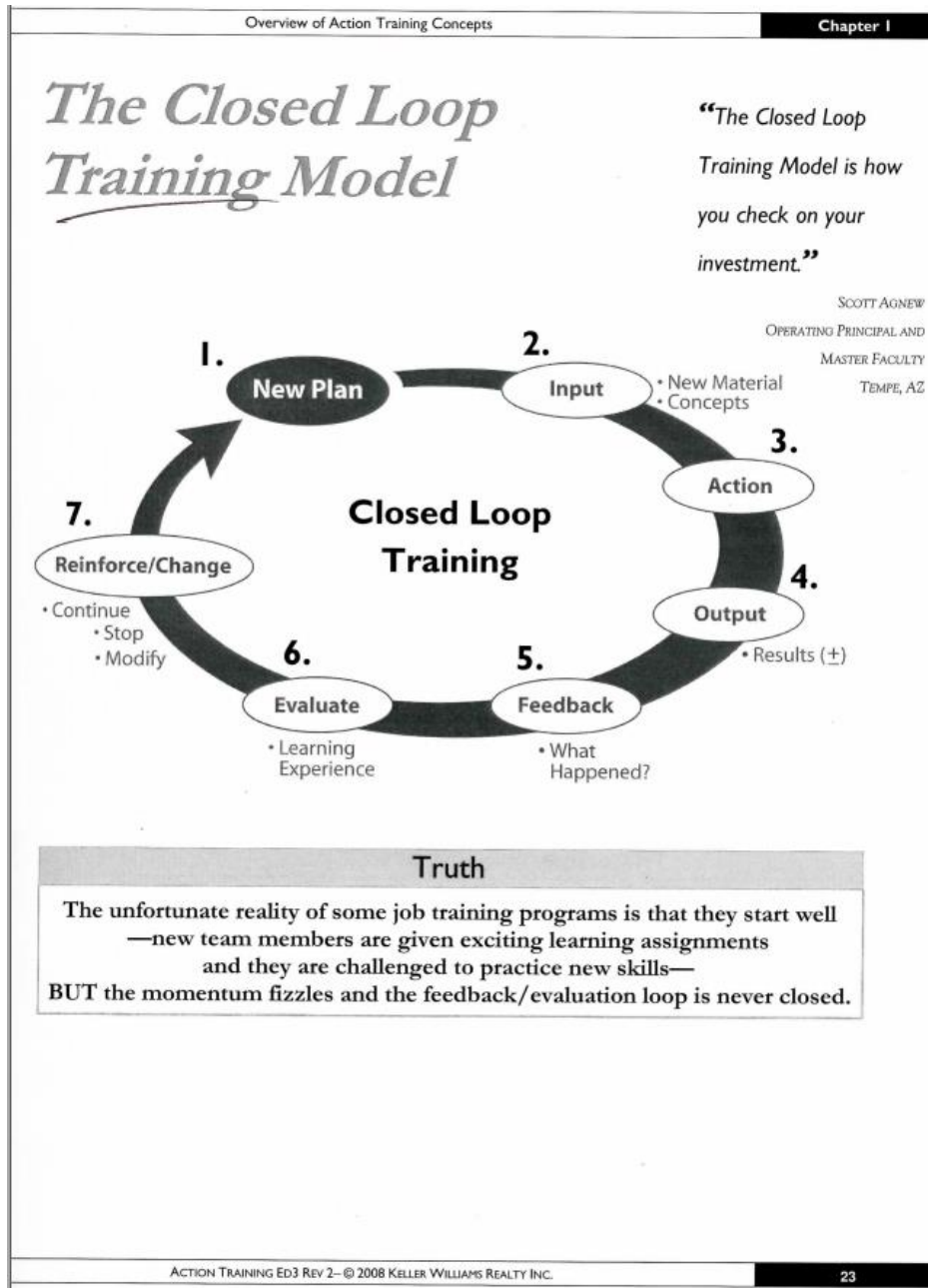
## Closed Loop Training Model

The unfortunate reality of some job training programs is that they start well

New team members are given exciting learning assignments and they are challenged to practice new skills

BUT the momentum fizzles and the feedback/evaluation loop is never closed.

### Graphic- the Closed Loop Training Model



## **Closed Loop Training**

1. New Plan

2. Input

- New Material
- Concepts

1. Action

2. Output

- Results ( $\pm$ )

1. Feedback

- What Happened?

1. Evaluate

- Learning Experience

1. Reinforce/Change

- Continue
- Stop
- Modify

## PPP

### People

Resources to do this are...

1. RSTLM ([Recruit, Select, Train, Lead and Motivate – a Keller Williams Training Course](#))
2. UMS ([Utility Management Solutions](#))

3 C's for Staff and Vendors

1. Compliant
2. Care
3. Compassionate

### Process

(Management One's Revolutionary Operating Platform Systems)

**Staff** to Follow and implement the Systems and Playbook

**Vendor** to be compliant in contacting resident with 4hrs on gen work orders, Invoice timely, Complete estimates timely, use the Vendor portal

### Profits

- Process New Prospective Owners \$200 and New Prospective residents timely \$50, Focus on the cost to get the phone to ring.
- Think before we act on going to a property
- Make sure all fees are collected timely such as: Late fees, owner buyout of contracts, etc.

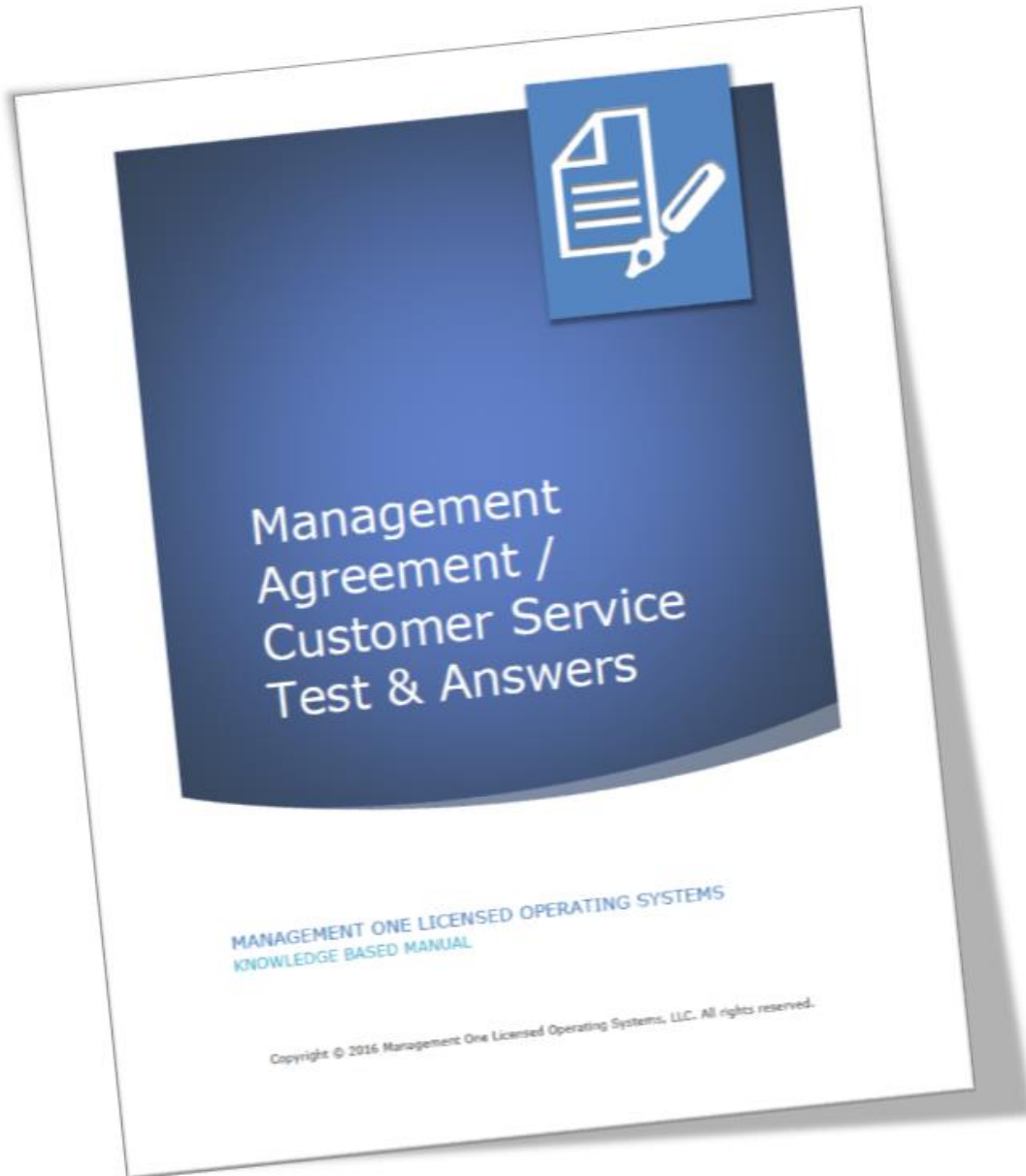
## Wellness Program

- Personal Development is for one hour a week during weeks 2, 3, 4 of the month in a conference with no phones, no interruptions. This is on a subject approved by your manager.
- Paid GYM memberships and work out one hour a week on company time
- Medical insurance; Medical is provided after 90 days of employment and company pays 55% for the employee. Other family members would be paid by employee 100%
- Retirement plan pay up to 3% of your salary
- Flex Time
- Healthy company luncheons
- Daily meetings (see check list) and 15 minutes of training
- Weekly training with management 1 hour
- Once a month training with management on special topic 1our
- Using the RSTLM ([Recruit, Select, Train, Lead and Motivate – a Keller Williams Training Course](#))
- Make office exciting around each holiday and decorate office for each to create high moral for staff and your customers will be excited when they come you build a better rapport with them.

## Management Agreement/Customer Service Test & Answers

[Click Here to Download MS Word .docx file](#)

**Test- Management Agreement/Customer Service**



## Keyboard System

The keyboard is a color coded board which is labeled with the property address on each tag along with 3 hooks for sets of keys and relevant tags. The Color coded sections denotes the current level of occupancy/vacancy and correlates directly with 3 reports;

1. (ILR) Internal Leasing Report
2. (RML) Resident Move-in Ledger
3. (COL) Close-Out Ledger

## Keyboard Color Code



The keyboard is organized and segregated by 5 Colors which correlates directly with 3 reports; (ILR) Internal Leasing Report, (RML) Resident Move-in Ledger & the (COL) Close-Out Ledger; as well as denotes the current level of occupancy.

**Orange-** Owner occupied

**Blue-** Vacant

**Green-** Tenant occupied

**White-** Rented/Move-in

Yellow - Closeout

## Color Categories Explained

### Orange Label- **Owner occupied**

Owner is still occupying property so you cannot check out keys to this property to anyone and the property must be personally shown (3 sets of keys on the board at this time) (the property address & the scheduled move out date to be noted on the tag)

### Blue Label - **Vacant**

Property is vacant (please note the Property Inspector must walk the property before it's deemed vacant; an owner or a resident turning in keys is not considered vacant and details of this will be covered in training as to why) (2 sets of keys and a red tag on the board at this time) The property inspector will change the keys to a Blue Tag once the first walk through has been completed.

### Green Label - **Tenant occupied**

Current Resident is still occupying the property so you cannot check out keys to this property to anyone (there would only be 1 set of keys on the board at this time) (The property address & scheduled move out date to be noted on the tag)

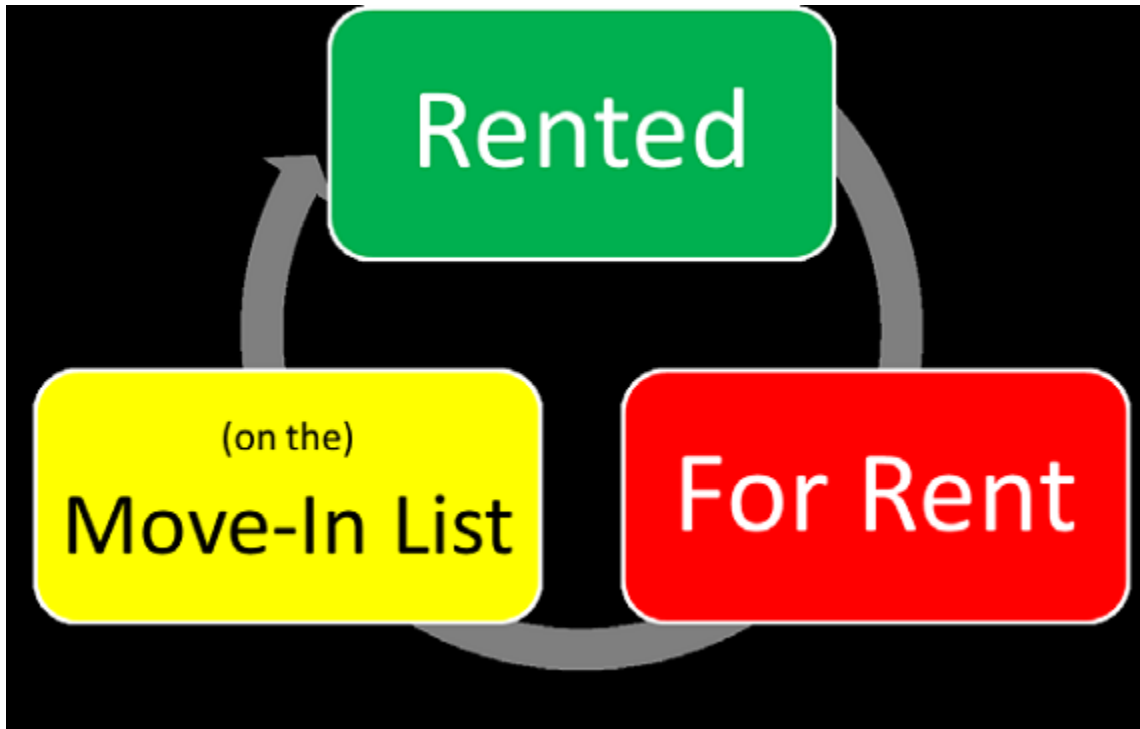
### White Label - **Rented / Move-in**

Property is rented and waiting for the new resident to move in (1 set of keys if the property is still occupied; 2 sets of keys and a red tag if the property is vacant) (the property address & the scheduled move in date to be noted on the tag)

### Yellow Label - **Closeout**

These tags are for all properties that are being closed out after a resident moves out. (the property address & scheduled move out date to be noted on the tag)

## Key Board Statuses & Rental Categories



There are only 4 statuses a property will be in, within our inventory.

1. For Rent
2. Move-in
3. Rented
4. Closeout

There are only 4 categories that properties will come from, "for rent", and will either have an (NPO) New Prospective Owner sheet or a (BOM) Back on Market sheet.

(N) New Accounts-NPO

(R) Re-rent-BOM

(E) Evictions-BOM

(B) Breaking of Lease-BOM

### Additional Tags

White Tag with Writing ("Keys to be made") New Account



If Owner Occupied - An Owner is to turn in 3 sets of keys when the sign as a new account, however if the owner only has one set to turn in, the keys will be placed on the board with two tags that state "Keys to be Made" until the Property Inspector has been able to make copies.

White Tag with Writing (R - OCC) Resident Occupied

If Resident Occupied - When a property is a "Back-on-Market" or a "Closeout", then the one set of keys, kept on file in the office, will be placed on the board with two tags that state "Keys to be Made" until the Resident vacates and turns in the two sets they have.

White Tag with Writing ("Staff Member's Name") Keys are Checked Out

If a Staff member has checked keys out for a Showing or to Personally Show, they would replace the key set with a key tag that has their name on the board so that anyone can see who is responsible for the keys that are checked out.

White Tag with Writing ("Owner") Keys are Checked Out

If the property is Vacant, and the Owner has decided to manage the Rehab himself, he would then checkout a key from the office or may have his contractor check a key out. For each set of keys checked out, they would be replaced with a tag stating "Owner" so you know the owner has them. A checkout key form would also have been signed by the owner or their contractor.

3 sets of keys with White Address Tags (V - VAC) Vacant


The Occupant has vacated and all keys are on the board

**Red Tag- Lockbox on property**

One set of keys is taken from the board placed in a lockbox secured at the property on the front door. The Keys on the board are replaced with a Red Key Tag (this is only on vacant properties, once the First Walk Through (FWT) has been performed by the Property Inspector)

## M1 Rehab Algorithm "For Rent" Inventory Tool

### M1 Rehab Algorithm "For Rent" Inventory Tool



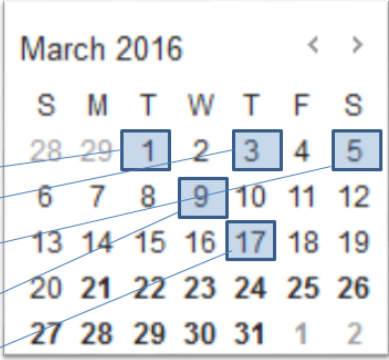
  

**LMS (Leasing Maintenance Status)**  
**Availability Date**

(Status codes correspond to each number of days remaining)

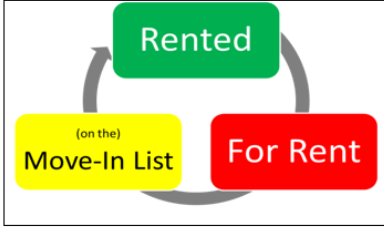
- OCC (Occupied) - 17 calendar days to move in
- FWT (First Walk Thru) - 15 calendar days to move-in
- WF (Waiting for Funds) - 12 calendar days to move-in
- **WBDO (Work Being Done by Own)** - 12 calendar days to move-in
- WBD (Work Being Done by Mgt One) - 8 calendar days to move-in
- COM – (Ready - Can Move in Anytime) - 0 days until move-in

**For Total Transparency to all Staff**



**Powered by**  
**Management One**  
Property Management



This Algorithm is used to determine the Date a property can be Available for a Resident to take possession.

To work this Algorithm, one must count down or count backwards, meaning on day one (i.e., the property is Vacant and the Property Inspector can perform his initial [FWT] First Walk Through) the schedule affords 17 days until the property is available for move-in.


As the schedule progresses each status acts as a milestone with a certain number of days afforded for that phase in the process. It will be very apparent if there is an issue in meeting the deadline to make this property available by the calculated date, if the property status does not correlate with the calculated days in the process. For example, if today's date is the 11th, and the property is committed to a New Resident to be ready on the 17th, then the status needs to be (WBD) Work Being Done in order to be on schedule. If the Status is still (WF) Waiting Funds from the owner, then the number of days available for the contractors to complete the work and the time needed for the Property Inspector to perform his Final Walk Through is now


greatly restricted and chances are the Resident Move-in Date will have to be pushed out, which can cause a number of issues on all parties including expenses and scheduling.

-All Properties must correlate their position on the key board with their Occupancy Status and reflect their availability dependent on their (LMS) Leasing Maintenance Status as indicated in the (ILR) Internal Leasing Report and (RML) Resident Move In Ledger.

## M1 Rehab Algorithm "For Rent" utilizing the Internal Leasing Report (ILR)

### M1 Rehab Algorithm "For Rent" Integrate with M1Software





**Management One Moreno Valley**  
23846 Sunnymead Blvd. #10  
Moreno Valley, CA 92553  
Phone:951-924-4315 Fax:951-924-7241

**Internal Leasing Report**  
April 25<sup>th</sup> 2016

ADDRESS	City Code	Sqam Feet	Stores	Balks	Balks	Flagstone	Central Air	Public Covered	Folio Slab	Lanes In	Lane Service	# Car Garage	Fool	App	Pets	Min Occupancy	Available	Occupied By	Days On Market	Calls	Resend Shows	Resend Shows	Current Rent	High Rent	Low Rent	Appa Ranking	Appa Demand	App Status	LMS	Rental Code	Cross Streets
5697 Abernathy Dr.	RV	2200	2	4	2.5	Y	Y	Y	Y	FB	N	2	N	N	7	6	READY	V	71	18	4	0	1875	1995	1875	0	0		CUM	E FAIR ISLE/ABER	
25751 Cayenne Ct	MV	1200	2	4	2	Y	Y	Y	Y	FB	N	2	N	N	0	6	MHOLD-CO	V	23	0	0	0	1345	1345	1345	0	0		WBD	N *COTTONWOOD	
10/16/201																															
16617 Crestmont Pl	RV	3500	3	5	3	Y	Y	N	Y	FB	N	2	Y	Y	7	7	11/26/2012	O	15	4	0	0	2395	2395	2200	0	0		OCC	N TRAUTWEIN	
24116 Finley	MV	1550	1	4	2	Y	Y	Y	Y	FB	N	2	N	N	0	6	12/20/2012	T	23	4	2	0	1225	1275	1175	0	0		OCC	R BRODIAEAHEAC	
24281 Finley Dr.	MV	1524	1	4	2	Y	Y	N	Y	F	N	2	N	N	0	6	11/16/2012	V	69	17	2	0	1280	1375	1175	0	0		WBD	R HEACOCKCACT	
1088 Finley Dr	PE	1188	2	3	2	N	Y	N	Y	FB	N	2	N	N	0	5	11/23/2012	V	27	2	1	0	1250	1295	1175	0	0		FWT	N PERRIS/ NUEVO	
27774 Gladstone	MV	3200	2	5	4	Y	Y	Y	Y	FB	Y	0	3	N	0	7	12/21/2012	T	1	0	0	0	1995	1995	1795	0	0		OCC	R Moreno Beach/JF	
1035 Glona	HT	1900	1	4	2	Y	Y	N	N	FB	N	2	N	N	7	6	READY	V	129	45	13	0	1180	1395	1100	1	1		COM	HQEATON/SANDER	
25442 Hazelwood Trail	MV	1943	1	3	2	Y	Y	Y	Y	F	N	2	N	N	5	5	12/20/2012	Y	6	0	0	0	1450	1450	1250	0	0		OCC	R PERRIS/BORVIC	
2222 Jordside	PE	1819	2	4	2.5	Y	Y	N	N	FB	N	2	N	N	0	8	READY	V	31	3	1	0	1315	1395	1295	0	0		COM	E REDLANDS/PORA	
14611 Justin Pl	MV	1168	1	3	2	Y	Y	N	Y	F	N	2	N	N	0	5	11/16/2012	V	38	14	4	0	1175	1195	1095	2	2		WBD	E INDIAN/CACTUS	
16701 Kellenburg Ln	MV	1963	2	5	3	Y	Y	Y	Y	FB	N	2	N	N	0	6	HOLD-INS	V	2	0	0	0	1425	1525	1425	0	1		FWT	R PERRIS/KRAMEF	
11/6/2012																															
15200 Legendary Dr	MV	3089	2	5	3	Y	Y	N	Y	FB	N	3	N	N	7	7	12/12/2012	T	17	8	1	0	1895	1895	1795	1	1		OCC	R MORENO BEACF	
24473 Lotos	MV	1600	2	3	2	Y	Y	Y	Y	FB	N	2	N	N	0	5	T+90	T	49	34	5	8	1180	1200	1100	0	1		OCC	B INDIAN/LIODIS	
12930 Montecello Dr.	MV	1600	1	3	2	Y	Y	N	Y	F	N	2	N	N	0	5	11/23/2012	V	31	16	4	0	1175	1225	1025	1	0	AT	FWT	R Eucalyptus/Laspe	
23779 New England Dr	MV	1497	1	3	2	Y	Y	N	Y	N	2	N	N	N	0	0	MHOLD-CO	V	31	3	0	0	1325	1325	1325	0	0		FWT	N *GRAHAM/RALLEE	
10/8/2012																															
13048 Ninebark	MV	1341	2	3	2	Y	Y	N	Y	FB	N	2	N	N	0	5	MHOLD-CO	V	6	0	0	0	1125	1125						N *EUCALYPTUS	
10/31/201																															
23209 Norringsgrove	PE	1420	1	3	2	Y	Y	N	Y	FB	N	2	N	N	5	5	12/17/2012	T	3	0	0	0	1195	1195					RIDER/SEATON		
1491 Remembrance Dr	PE	1749	2	4	2.5	Y	Y	Y	Y	FB	N	2	N	N	6	6	READY	V	44	16	2	0	1200	1300					N *REDLANDS/NRUE		
16540 Saint George Way	MV	1600	1	4	2	Y	Y	Y	Y	FB	N	2	N	N	0	6	11/28/2012	O	10	3	0	0	1395	1395	1100	0	0		OCC	N *PERRIS/KRAMEF	
2544 Spectacular Bid	PE	1371	1	3	2	Y	Y	Y	Y	F	N	2	N	N	7	5	READY	V	1	0	0	0									
22073 Spring Crest Rd	MV	1300	1	2	2	Y	Y	Y	Y	FB	Y	2	N	N	0	4	HOLD-PAY	T	24	0	0	0									
10/23/2012																															
22601 Springdale Dr	MV	1600	2	3	2.5	Y	Y	Y	Y	FB	N	2	Y	Y	0	5	READY	V	48	17	4	0									
23607 Suncrest Ave.	MV	1400	1	3	2	Y	Y	N	Y	FB	N	3	N	N	0	5	HOLD-CON	D	11/1/2012	V	10	0	0	0							
11/1/2012																															


Rented


(on the)  
Move-In List

For Rent

## M1 Rehab Algorithm "For Rent" utilizing the Resident Move In Ledger (RML)

M1 Rehab Algorithm "For Rent"  
Integrate with M1Software

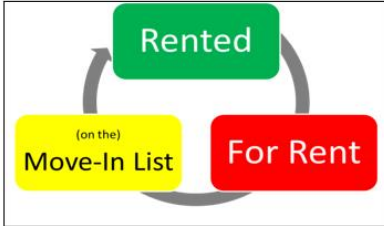




**Management One Moreno Valley**  
23846 Sunnymead Blvd. #10  
Moreno Valley, CA 92553  
Phone:951-924-4315 Fax:951-924-7241

Resident Move In Ledger  
April 25<sup>th</sup> 2016

Address	Rented	LMS	Proj. MID	Leasing REP	Occupancy	Mapgrid
21370 Shakespeare Ct. Moreno Valley 92557	10/25/2012	COM	11/12/2012	Marco	VACANT	716H1
25193 Billie Dr. Moreno Valley 92553	10/17/2012	WBDO	11/12/2012	Cindy	VACANT	717G7
15147 Calle Renfro Moreno Valley 92551	10/23/2012	COM	11/15/2012	Marco	VACANT	747H1
12213 Orchid Ln #C Moreno Valley 92557	11/1/2012	COM	11/20/2012	Marco	VACANT	717F2



### Key Board Protocol

-All Properties must correlate their position on the board with their Occupancy Status and reflect their availability dependent on their (LMS) Leasing Maintenance Status as indicated in the (ILR) Internal Leasing Report and (RML) Resident Move In Ledger.

-Every property on the key board must have 3 key tags

-New Accounts must have 3 sets of keys- if only 1 set is given, then there should be two tags which state "keys to be made" until they are made and hung on the keyboard.

-Back on Market (BOM) Properties will have 1 set of keys (from the office filing cabinet) and the other 2 hooks will have key tags which note "Resident Occupied".

-Occupied status address labels will state the potential move-out / vacancy date.

-When a resident turns in all keys, the address tag and keys are not moved from "Green" to "Blue" until the Property inspector has walked the property and changes the (LMS) Leasing Maintenance Status on the (ILR) Internal Leasing Report, from "OCC" to "FWT". The same goes for Owner occupied property; From "Orange" to "Blue".

-When a property changes to (FWT) First Walk Thru status, one set of keys are taken off the key board and placed into a lock box which is left on the door knob of the rental property. This key hook is then marked with a "Red" key tag to note that a set of keys are in a lock box at the property.

-If the owner or his vendor needs a set of keys, one will be taken off the board and replaced with a key tag that states "Owner" to note the owner has a key.

*-All keys must be signed out before released.*

-If a key is taken off the board or checked out to a prospect by a staff member, the set of keys must be replaced with a key tag with notes the staff member's "Name" whom removed the keys.

*-Only keys for "Vacant" status properties can be checked out to prospective residents. All prospects must have been pre-screened prior and must provide a photo ID, give a deposit for the keys and sign the (AIS) Applicant Interview Sheet which states they are not taking possession of the home.*

-Any property on the board may change status to "White" once a Holding Agreement is signed with a new prospective resident and the property is considered Rented and waiting for Move-in. The vacancy date is then replaced with the projected Move-in date on the address label.

## One Touch System

The One Touch System has been designed to provide order to one's day and reduce any feeling of being overwhelmed.

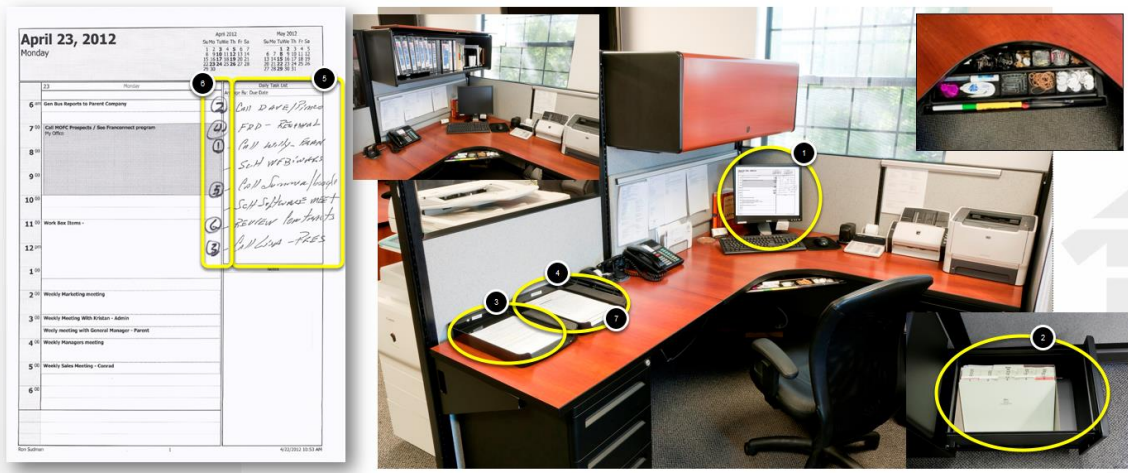
It's in the name...only Touch the Paper/file once, work it as far as you can take it, then move on to the next item.

The goal is to process through as much of the Stack of files in your Work Box as possible, eventually having an empty Work Box.

However, if at the end of the day there are a few items left, leave them in your Work Box. They will just take a higher priority for completion the following day.

The following day you will start over, beginning with the Steps of the One Touch System.

## One Touch System Outlined



## One Touch System

1. Run out **Outlook Calendar**
2. Pull items out of **Tickler File**
3. Take items out of **In Box**
4. Take items out of **Work Box**
5. **Write Out** all Priority items combined from Tickler, Work Box & Inbox
6. **Prioritize** your outlook 1-6
7. Place all Combined Items in **Work Box for the day**. \*(Any new Items will be placed in the Inbox and will wait to be addressed the following day)

Then, start with first item and go as far as you can go then either:

- A) File it
- B) Throw it away
- C) Set up in tickler if you're waiting for a call back
- D) or Tickler it for a future date

Spending 15-20 min a day organizing your work for the day and week will keep you from feeling you don't have enough time to get your work done and you won't be overwhelmed.

### **Contributing Factors that Lead to feeling Overwhelmed**

1. Doing things 3 times instead of once (Don't cut corners and Do it right the first time )
2. Not following the system and doing things out of order and having to back track
3. Getting complaints due to not following systems
4. Team members not being consider of other team players when they are out for the day and not calling in on time and being in the daily meeting. When this is not done pressure increases and complaints increase again taking up more time, thus making you feeling overwhelmed.
5. Not asking for managements help when you need it before you are drowning to guidance and assistance but not to do the actual work. (Use your life lines)

## **New Hire**

### **New Hire Checklist**

[Click Here to Download MS Word .docx file](#)

Date: \_\_\_\_\_

Employee: \_\_\_\_\_



## Day 1

- Supply Employee Handbook and have necessary forms & handbook signed off
- Sign Real Estate License agreement (License to be held by Broker)
- Make a copy of employee SS card and Driver's License
- If selecting Direct Deposit, employee to furnish VOIDED check
- Set up M1 User login access
- Set up time card login access
- Set up email
- Supply training manual and training schedule to employee
- Supply 100 most asked Q&A's and schedule testing date
- Supply rental agreement and schedule testing date for 2nd week of employment
- Supply management agreement and schedule testing date 3rd week of employment
- Supply test for their division and schedule test date for 8th week of employment
- Supply them trying testing on line if less than 50WPM
- Go over One One-Touch System - View Video in General Guide
- Go over daily hours including breaks, lunch hour, daily and weekly meetings
- Go over dress code
- Introduce to other personnel & tour of office

( Note on all tests, it's up to them to come to you on the date and time to take the test, if they do not that it is a test within itself that they failed to meeting a deadline )

## Day 2 - 5

- **See "First 5 Days Training Checklist" This is a separate check list from this day 1-180 check list**
- View how to use M1 Software (overview) video in M1
- View each webinar pertaining to division in M1
- View each video pertaining to division in M1
- View each quick start pertaining to division in M1
- Read over training manual
- Train on availability dates (17,15,12, 8) - See Video General Guide
- Train on LMS (leasing maintenance status) - See Video General Guide
- Train on Key Board- See Video General Guide
- Train on One Touch System - See Video



- Spend 20 minutes with manager at the end of day to review the day
- Confirm employee is taking notes and organizing them
- Provide Your Company's generic name badge

### Day 5

- Test on [100 most asked Questions](#). For continued employment (this will show if they apply themselves and want a job or career or just a paycheck) should be at 80% plus

### Day 6-10

- Spend 10-20 minutes with manager at the end of day to review the day and use first 100 days and closed training loop graph each time
- Confirm employee is taking notes and organizing them
- Fill out [Hiring Evaluation](#) form to confirm if employee will continue to 2nd week of employment (1st 2 weeks are temporary employment)
- Evaluate Hiring Evaluation form (See [Hiring evaluation](#) after 10 and 90 days Form)
- Make a decision if employee will continue employment by the end of the 10th work day

### Day 11-30

- Spend 10-20 minutes with manager at least 3 times a week to review training & questions and use first 100 days and closed training loop graph each time
- Confirm employee is taking notes and organizing them (check weekly)
- Provide employee with office key
- Set up alarm code/access to office
- Order employee Your Company's name badge
- Confirm employee has passed rental agreement test, should be at 70% minimum, then give them answers to questions missed and set to retest on those questions in one week should then be at 90% plus.
- Confirm employee has passed management agreement test, should be at 70% minimum, then give them answers to questions missed and set to retest on those questions in one week should then be at 90% plus

### Day 30

- Should be 30% through training see first 100 days graph and closed training loop

### Day 31-60

- Spend 10-20 minutes with manager at least 3 times a week to review training & questions and use first 100 days and closed training loop graph each time
- Confirm employee is taking notes and organizing them (check weekly)
- Confirm employee has passed division test(s)

### Day 61

- Should be 60% through training see first 100 days graph and closed training loop

### Day 61-90

- Spend 10-20 minutes with manager at least 2 times a week to review training & questions and use first 100 days and closed training loop graph each time
- Confirm employee is taking notes and organizing them (check weekly)

### Day 90

- Should be 90% through training see first 100 days graph and closed training loop
- Fill out [Evaluation Form](#)
- Confirm typing speed has increased 10% (You can use many programs off the internet for them to improve typing skills)
- Complete final Employee probationary review evaluation and go over possible salary increase, eligibility for bonuses, medical, retirement, etc.
- Order employee business cards (if applicable)
- Order name plate for cubicle (if applicable)
- Provide clothing allowance funds
- Implement [Wellness program](#) - See Wellness program chapter
- Implement Personal Development Program

### Day 91-180

- Spend 10 minutes with manager at least 1 time a week to review advanced training & questions and use first 100 days and closed training loop graph each time

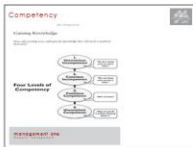
## 1 year

- Provide [self-evaluation form](#) for employee to fill out
- Complete annual review evaluation and go over possible salary increase

# Employee Training Presentation

[Click here](#) to download and customize your presentation.

## Power Point - Employee Training Presentation



## **First Week (5 Day) Training Daily Tasks**

First Week. Things to pay attention to which will tell you if they are looking for a job or career or just a paycheck or possible aren't competent for the position.

Give them the following:

### **Verbal Tasks**

- Print out your daily calendar each day
- Bring your 3 ring binder with you each day and at night write down questions for the next morning to ask me from the previous days training
- View all videos in your division each day and then shadow me the rest of the day
- Bring First 5 Days Training Checklist" to me each am and signed and dated that it was completed

### **Written Tasks**

- Run out the ILR and RML each day and set availability dates per 17,15,12,8
- Come to me each day to go over key board and how it matches up to ILR and RML
- See they follow the other items to do on the "First 5 Days Training Checklist"
- Call Office manager each day for 20 minutes right at 5pm

### **Re: 100 Most Q&A Test (on the 5th day)**

- See me if they come to take the test on time
- Should get 80% or higher

### **Things you want to be looking for in the first week**

- Do they take notes
- Do they retain after being told 1-2 times
- Are they on time for work and coming back from lunch
- Are they engaged
- How fast do they process task
- Are the proactive or reactive

## First 5 Days Training Checklist

[Click here](#) to download the checklist

### Day 1

- Orientation paperwork, etc.
- Watch Maintenance video
- Watch Phone Doctor video
- Read Training Manual in division

### Day 2

- View how to use M1 Software (overview) video in M1
- View each webinar pertaining to division in M1
- View each video pertaining to division in M1
- View each quick start pertaining to division in M1
- Read over training again
- Train on availability dates (17,15,12, 8)
- Train on LMS (leasing maintenance status)
- Train on Key Board
- Train on One Touch System
- Spend remaining time shadowing the person training them in that division
- Spend 20 minutes with manager at the end of day to review the day
- Confirm employee is taking notes and organizing them
- Spend 30 min/day writing down notes on questions to ask the manager the next day

### Day 3

- View how to use M1 Software (overview) video in M1
- View each webinar pertaining to division in M1
- View each video pertaining to division in M1
- View each quick start pertaining to division in M1
- Read over training again
- Train on availability dates (17,15,12, 8)
- Train on LMS (leasing maintenance status)
- Train on Key Board
- Train on One Touch System
- Spend remaining time shadowing the person training them in that division

- Spend 20 minutes with manager at the end of day to review the day
- Confirm employee is taking notes and organizing them
- Spend 30 min/day writing down notes on questions to ask the manager the next day

#### Day 4

- View how to use M1 Software (overview) video in M1
- View each webinar pertaining to division in M1
- View each video pertaining to division in M1
- View each quick start pertaining to division in M1
- Read over training again
- Train on availability dates (17,15,12, 8)
- Train on LMS (leasing maintenance status)
- Train on Key Board
- Train on One Touch System
- Spend remaining time shadowing the person training them in that division
- Spend 20 minutes with manager at the end of day to review the day
- Confirm employee is taking notes and organizing them
- Spend 30 min/day writing down notes on questions to ask the manager the next day

#### Day 5

- View how to use M1 Software (overview) video in M1
- View each webinar pertaining to division in M1
- View each video pertaining to division in M1
- View each quick start pertaining to division in M1
- Read over training again
- Train on availability dates (17,15,12, 8)
- Train on LMS (leasing maintenance status)
- Train on Key Board
- Train on One Touch System
- Spend remaining time shadowing the person training them in that division
- Spend 20 minutes with manager at the end of day to review the day
- Confirm employee is taking notes and organizing them
- Spend 30 min/day writing down notes on questions to ask the manager the next day

## First 100 Days Graph

### **Key Concepts of Action Training**

The second course in the [RSTLM™ series is Action Training](#).

Action Training is a system and a philosophy that gives new hires the greatest possible opportunity to succeed in their new job. It outlines the resources and training techniques that can help you bring your new hire up to speed on the necessary knowledge, attitudes, skills, and habits of the first 100 days of their employment. The outcome of the Action Training process is that your new hire will be a self-managed individual who contributes to an increase in production.

A key concept in Action Training is the Growth vs. Control Relationship.

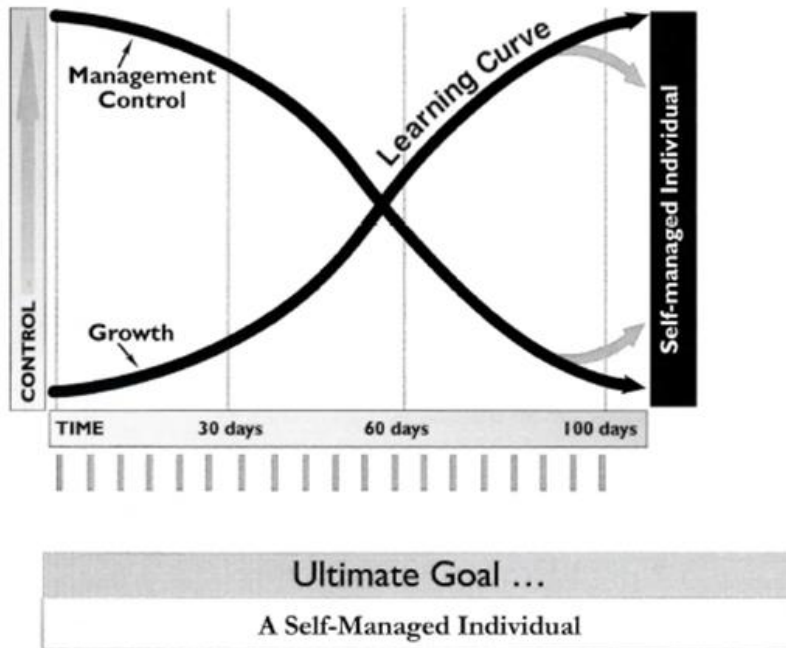
As this graph illustrates, a new employee will initially require a great deal of management control on your part. However, as the employee grows in competence, your control will diminish. As you relinquish control, you will take on the role of a leader who motivates.



## Graphic - Growth / Control Relationship

*The First 100 Days*

### Growth/Control Relationship



*“I’ve used this Growth/Control graph with every person I have hired since 1994. This is about your perspective as a leader and your responsibility during the first 100 days.”*

MARK WILLIS

CEO

KELLER WILLIAMS REALTY INTL.

AUSTIN, TX

## Hiring Evaluation After 10 and 90 Days

An [evaluation](#) should be drafted after the first 10 days of training and then once again, as a 90 day review.

### Form - Hiring Evaluation

Employee: \_\_\_\_\_

Hire Date: \_\_\_\_\_

1. Are they taking notes in detail? (On a scale of 1-10- 10 being highest)

\_\_\_\_\_

2. Are they following verbal instructions and did you write down what you ask the staff and what and did they respond on time and thoroughly?

\_\_\_\_\_

3. How many verbal instructions did you give the staff member?

\_\_\_\_\_

4. Are they following written instructions and did the staff respond on time and thoroughly?

A) How many written instructions did you give the staff member?

\_\_\_\_\_

5. Are they comprehending (On a scale of 1-10- 10 being highest)

A) How many times do you have to tell them the same thing before they get it?

\_\_\_\_\_

6. Are they retaining on at least 3 items each week during the first two weeks?

\_\_\_\_\_

7. Do they show up ahead of time, on time or late?

\_\_\_\_\_

8. Are they proactive or reactive?

\_\_\_\_\_

9. Would you continue with them if you were paying the bills and it was your company?

If you would or would not, explain why?

\_\_\_\_\_

10. Did they pass the Q&A test? (minimum of 90% Score required)

Score: \_\_\_\_\_

**Continued: Hiring Evaluation after 10 and 90Days**

Did they take notes on this process? Yes / No

Did they have to ask for help? Yes / No How many  
times? \_\_\_\_\_

Did they question the process? Yes / No How many  
times? \_\_\_\_\_

Did they ask "Why do you do that?" or "How do you do that?" Yes  
/ No

When asking a question, do they use "you guys" or "we" when  
referring to Your Company? Yes / No

View Graph on First 100 days of training and see if indeed they are  
there.

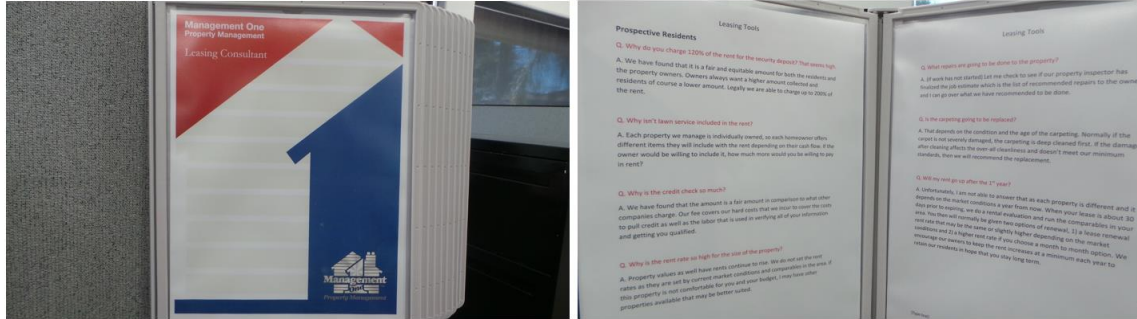
Trainer Critique:

# Client Coordinator

## FAQ- Frequently Asked Client Coordinator Questions and Answers

[Click Here to Download MS Word .docx file](#)

### Quick Reference Flip Chart



It is recommended that the following Frequently Asked Questions are printed and displayed in a Hanging Flip Chart in the Station or Cubical of the Leasing Consultant Division for Quick Reference.

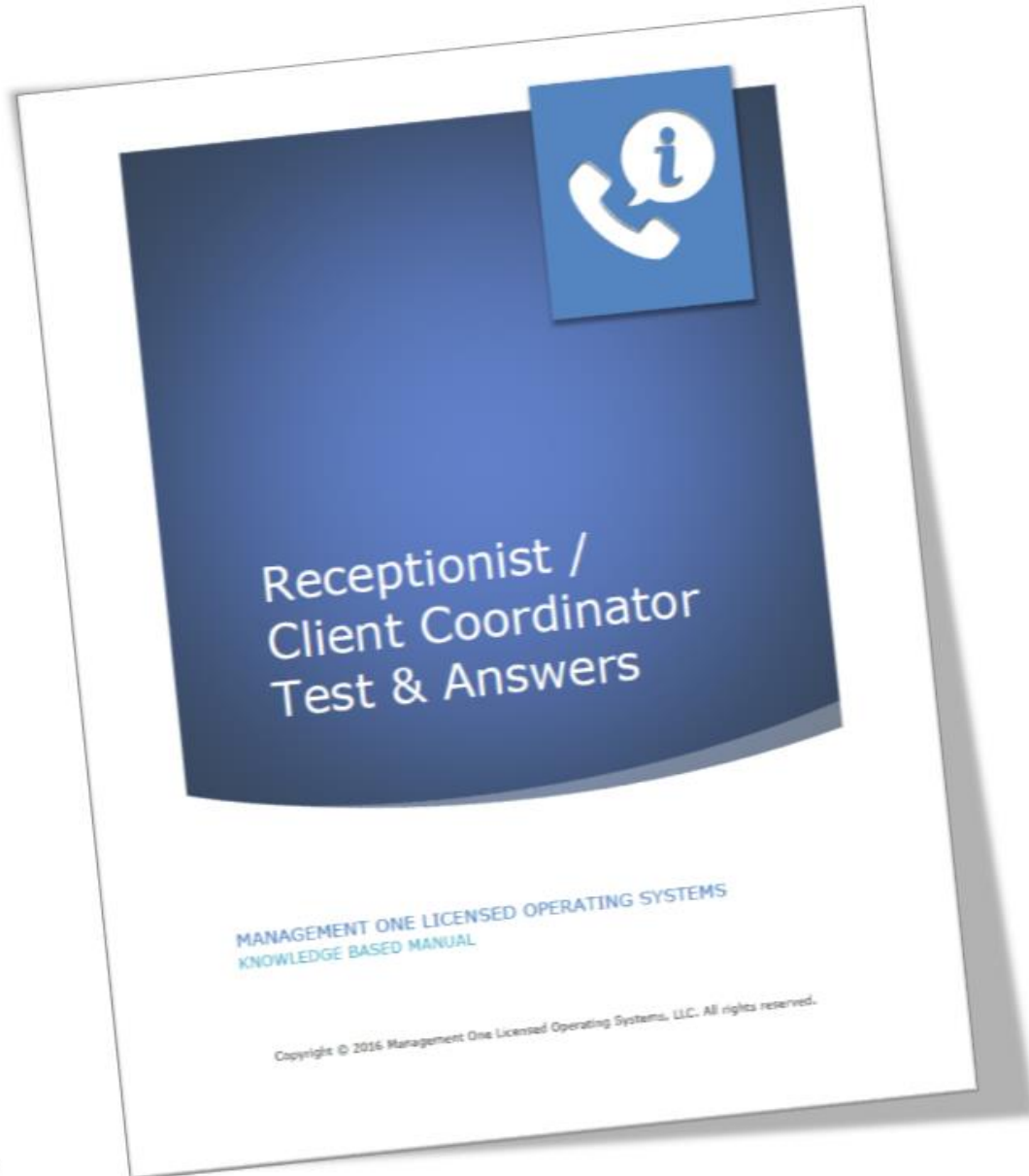
This way the information is not hidden on the computer somewhere and it gives any new person the advantage they need for quick responses as well as providing superior customer service as they appear very knowledgeable from the very first day.

[Click Here to acquire your own "Wall Reference Organizer"](#)

## Receptionist/Client Coordinator Q&A Test & Answers

[Click Here to Download MS Word .docx file](#)

### Test- Receptionist/Client Coordinator



# Accounting Division

## Accounting/Customer Service Salary and Bonuses

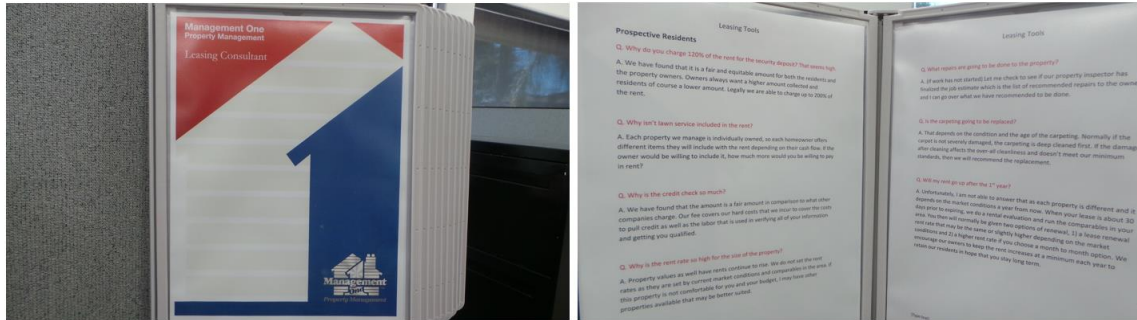
### Accounting/Customer Service Salary and Bonus Spreadsheet Sample

<b>Accounting/Customer Service</b>		
<b>Example</b>		
<b>Base (Range 1800-3000)</b>	<b>\$</b>	<b>-</b>
Gen Bus Bonus ( Starts in 90 days)	\$	250.00
<i>(See Gen Bus for Qualifications)</i>		
Personal Bonus ( Start in 90 days)	\$	250.00
<i>(Lates Fees must be 1% or less of rent collected for the month to earn 50%)</i>		
<i>(Supervisory fees and Rent increase fees must be collected to earn 50% of bonus earned)</i>		
Medical - Est ( Starts in 90 days)	\$	150.00
Retirement - Est (Starts after \$5000 is earned)	\$	75.00
Reimburse for mileage - If your per car is used	?	
<b>Total compensation package</b>	<b>\$</b>	<b>725.00</b>
Time and half paid for overtime on wk end/even	?	

# FAQ- Frequently Asked Accounting Questions and Answers

[Click Here to Download MS Word .docx file](#)

## Quick Reference Flip Chart



It is recommended that the following Frequently Asked Questions are printed and displayed in a Hanging Flip Chart in the Station or Cubical of the Accounting Division for Quick Reference.

This way the information is not hidden on the computer somewhere and it gives any new person the advantage they need for quick responses as well as providing superior customer service as they appear very knowledgeable from the very first day.

[Click Here to acquire your own "Wall Reference Organizer"](#)

## The First 100 Days for Accounting / Customer Service

[Click Here to Download as a Checklist](#)

### 0-30 days

#### **Accounting / Customer Service Job Description**

[100 Most Asked Questions at Management One Test](#)

[M1 software training 40 min](#)

[One Touch system](#)

[Read Training Manual](#)

[Watch all Accounting Videos](#)

[Learn operations algorithm 17,15,12,8](#)

[Learn \(ILR\) Internal Leasing Report](#)

[Learn \(LMS\) Leasing Management Status](#)

[Learn \(RML\) Resident Move-In Ledger](#)

[Take Management Agreement test](#)

Take Rental Agreement test

[Key Board training](#)

Key board - update board as status' change

Follow monthly calendar

[Daily deposit](#)

Run rent receipts monthly

Post rents

[Bulk posting of rents](#)

Prep 3-day notices for late rents

[Print and prep 3 days for Property Inspector](#)



[Send monthly account statements to owners](#)

Proof invoices with PI 20 minutes a week

[Pay Invoices weekly to vendors](#)

[Cut checks to owners, residents, vendors, etc.](#)

[Retains on accounts - update retains](#)

[Sweep - paying Management One weekly on commission owed](#)

[Utilities - turning on/off during vacancy](#)

Take bookkeeping/customer calls from residents, owners, etc.

Reports - daily & weekly reports

Make Keys on Key Machine

### **31-60 Days**

#### **Accounting / Customer Service Job Description**

[Make address changes into system for owners, vendors, etc.](#)

[Back on Markets](#)

[Market comps - \(CRA\) Comparative Rental Analysis for back on markets](#)

[Lawn service - adding/canceling temporary and permanent service](#)

Property kills - once rented, kill from rental list, etc.

[New properties - enter into the system](#)

[New leases/re-rents - enter new resident information into the system](#)

Notices of violations to residents from HOA's, etc.

Rent increase letters to owners - assist in making sure all are out on time

Rent increase letters to residents - confirm all updated into computer once in

[Security deposits - breakdowns to residents, disputes, collections](#)

[Collection of resident owes/late fees - weekly tracking, sending notices](#)

[Eviction Updates to owners weekly](#)

Issue Emergency repairs if PI is not in the office

## **61-100 Days**

### **Accounting / Customer Service Job Description**

Pull files and videos (if not in m1 software) for PI on BOM

[Prep Security Deposit Disputes and then converse with PI](#)

Do a Security deposit disbursement

[Closeout of account - statements/releases to owners, residents](#)

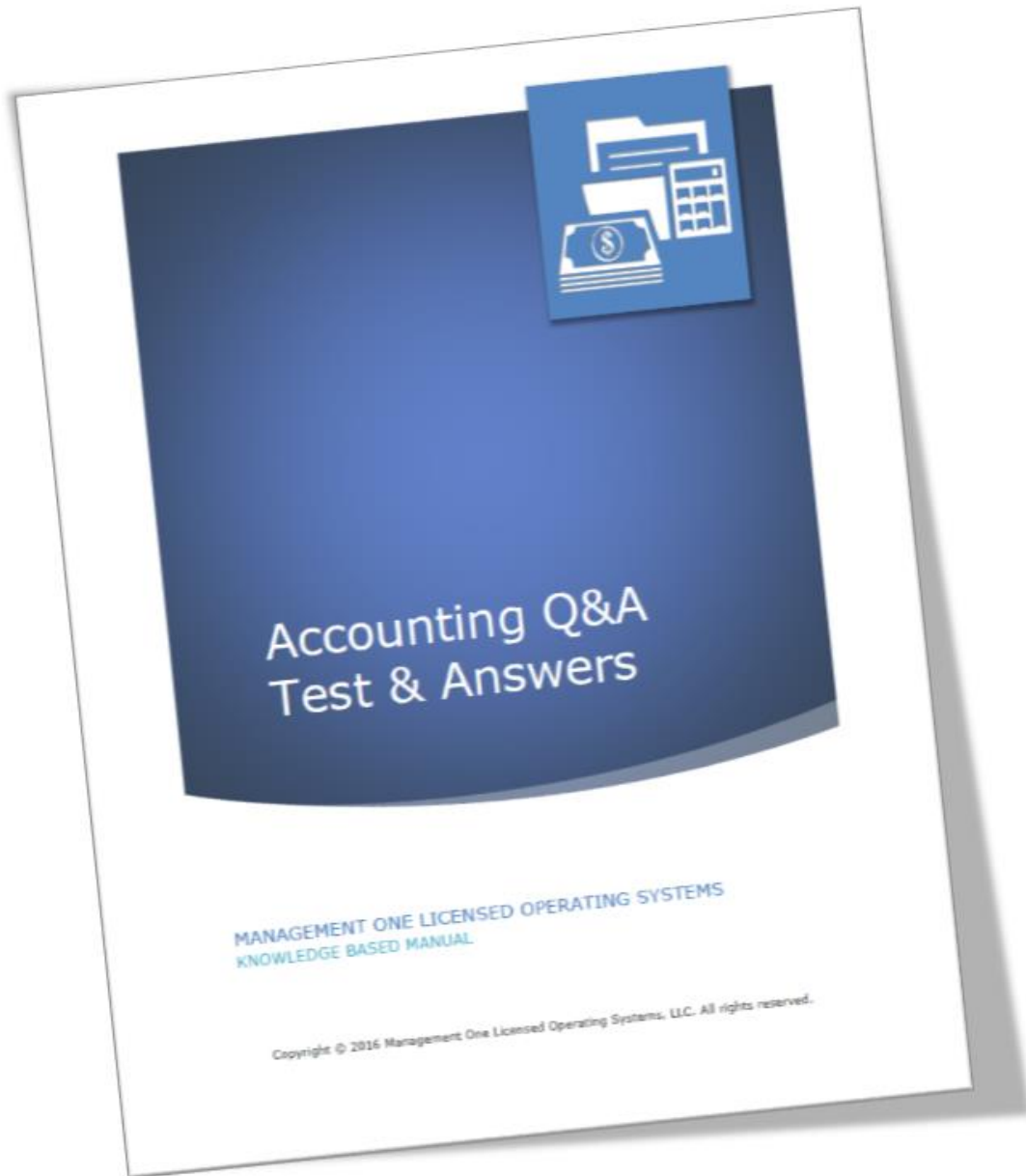
[Accounting/ Bookkeeping - Customer Service Test](#)

Retake any test to be at 90% or better

## Accounting Q&A Test & Answers

[Click Here to Download MS Word .docx file](#)

### Test - Accounting Q&A's



## Accounting Stadium Speech for New Owners

[Click here](#) to download and customize your stadium speech.

Hello Mr./Ms. (Owner)

My name is <Acct/Customer Service at "the Comapany"> I want to welcome you to "the Company"!

The reason for my call today is to welcome you to "the Company", introduce myself, and inform you of the services I will be providing you.

- A little about "the Company":
  - We have processed over 400 million rents in the last 30 years.
  - We are audited every 30 days to be in compliance with state agencies
  - We take a unique strategy on raising rents while still being competitive within the rental market. In 2015 we were able to secure an additional \$185,000 dollars for our property owners in rent increases last year.
- I work on the accounting aspect of your account; therefore, I will be processing your rent, any payables, and sending funds over to you.
- You will have access to an online portal where you can view your account statement, invoices, annual inspections, photos of your property and newsletters 24/7. With this tool you won't have to wait for the office to be open if you have any questions about your account over the weekend. You can access the information at any time via smartphone, tablet, or computer.
- When can we get together for a few minutes (5-10) so I can show you how things work? I will also email and mail you a letter of the process to view your online information so you can have the login information for your records.

Well again, welcome you to "the Company" so glad to have you as part of our family. I look forward to serving you and your future residents. Feel free to call or email me any time should you have any questions or concerns. Thank you for your time and have a great day!

# Leasing Division

## Leasing Salary and Bonus Structure

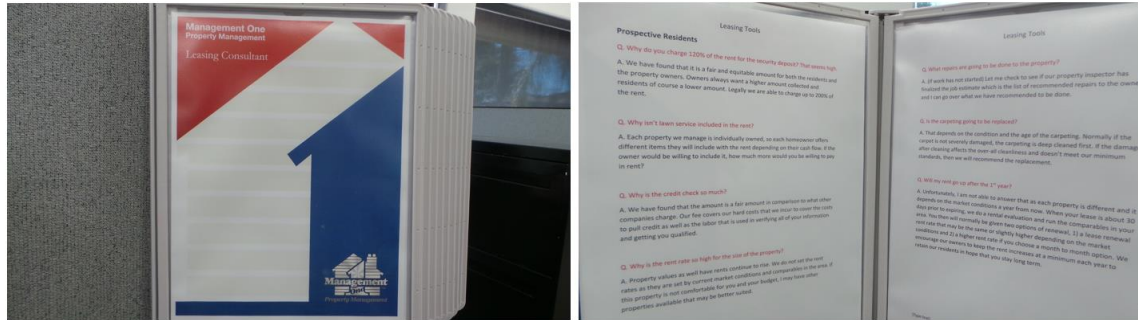
### Leasing Salary and Bonus Spreadsheet Sample

Leasing Consultant		Per Hour Rate	Accts			
<b>Example</b>			Signed			
<b>Base (Range 1800-2500)</b>	\$ -	\$ -	1-4	\$ 35.00	\$ 35.00	\$ 140.00
Gen Bus Bonus ( Starts in 90 days)	\$ 250.00	\$ 1.44	5-8	\$ 45.00	\$ 225.00	\$ 320.00
Personal Bonus ( Start in 90 days) Properties rented	\$ 320.00	\$ 1.84	9-14	\$ 55.00	\$ 495.00	\$ 770.00
			15-21	\$ 60.00	\$ 900.00	\$ 1,260.00
Total per hour rate		\$ 3.28	22 +	\$ 65.00	?	?
Medical - Est ( Starts in 90 days)	\$ 150.00					
Retirement - Est (Starts after \$5000 is earned)	\$ 75.00					
Reimburse for mileage - Showing Property	?		Add Management One as additional insured			
<b>Total compensation package</b>	<b>\$ 795.00</b>					
Time and half paid for overtime on wk end/even	?					
* If there 8 or less properties for rent and if you make your leasing goal then you would receive the \$320. If you do not make goal then you would get what is paid out in this agreement.						
Goal is based on 95% of the properties that are for rent at end of the first business day of work each month.						
Example						
A) 5 properties for rent on the first day of month and you have to rent 4 but you only rent 3 you get just \$60.						
B) 5 properties for rent first day of month and you have to rent 4 and you rent 4 you get \$240						
C) At 9 properties plus you must make your mark for GB each week but your bonus operates as set out here.						

# FAQ- Frequently Asked Leasing Questions and Answers

[Click Here to Download MS Word .docx file](#)

## Quick Reference Flip Chart



It is recommended that the following Frequently Asked Questions are printed and displayed in a Hanging Flip Chart in the Station or Cubical of the Leasing Consultant Division for Quick Reference.

This way the information is not hidden on the computer somewhere and it gives any new person the advantage they need for quick responses as well as providing superior customer service as they appear very knowledgeable from the very first day.

[Click Here to acquire your own "Wall Reference Organizer"](#)

## **The First 100 Days for Leasing Consultant / Applications**

[Click Here to Download as a Checklist](#)

### **0-30 Days**

#### **Leasing Consultant / Applications Job Description**

[100 Most Asked Questions at Management One Test](#)

[M1 software training 40 min](#)

[One Touch system](#)

[Read Training Manual](#)

[Watch all Leasing Videos](#)

Learn operations algorithm 17,15,12,8

[Learn \(ILR\) Internal Leasing Report](#)

[Learn \(LMS\) Leasing Management Status](#)

[Learn \(RML\) Resident Move-in Ledger](#)

[Take Management Agreement test](#)

Take Rental Agreement test

[Key Board training](#)

[Studying objections](#)

Role Playing

[Take/field leasing calls](#)

Assist with greeting customers & directing traffic

Sit with walk in leasing prospects

[Log calls, showings, applications into M1](#)

Pre-qualify leasing prospects

[Schedule appointments with prospective residents to come into office](#)

[Schedule appointments with prospective residents to view properties in the field](#)

[Check out keys to prospective residents](#)

[Get applications](#)

[Run credit, call on verifications and qualify applications](#)

[Preparing holding deposit](#)

Do Holding Deposit with resident

Do weekly leasing updates to owners via phone/email

[Meet targets & goals for applications and renting properties](#)

Make Keys on Key Machine

Take Test on objections

Take test on alternative of choice

### **31-60 Days**

#### **Leasing Consultant / Applications Job Description**

View inventory (inside/outside)- be at 85% at all times

[Prep lease/move in package](#)

Set up for resident celebration

Preparing Leasing presentation

[Lease presentation with resident](#)

Schedule move in inspections for P.I. with new resident move in

[Issue work order for lock change to be done prior to resident move in](#)

Log prorated rents on new move ins

Ask for referrals at resident lease sign up

Assist with answering phones



Assist with taking rents

Process BOM properties

Role Playing

## **61-100**

### **Leasing Consultant / Applications Job Description**

[Application Test](#)

[Leasing Test](#)

Role Playing

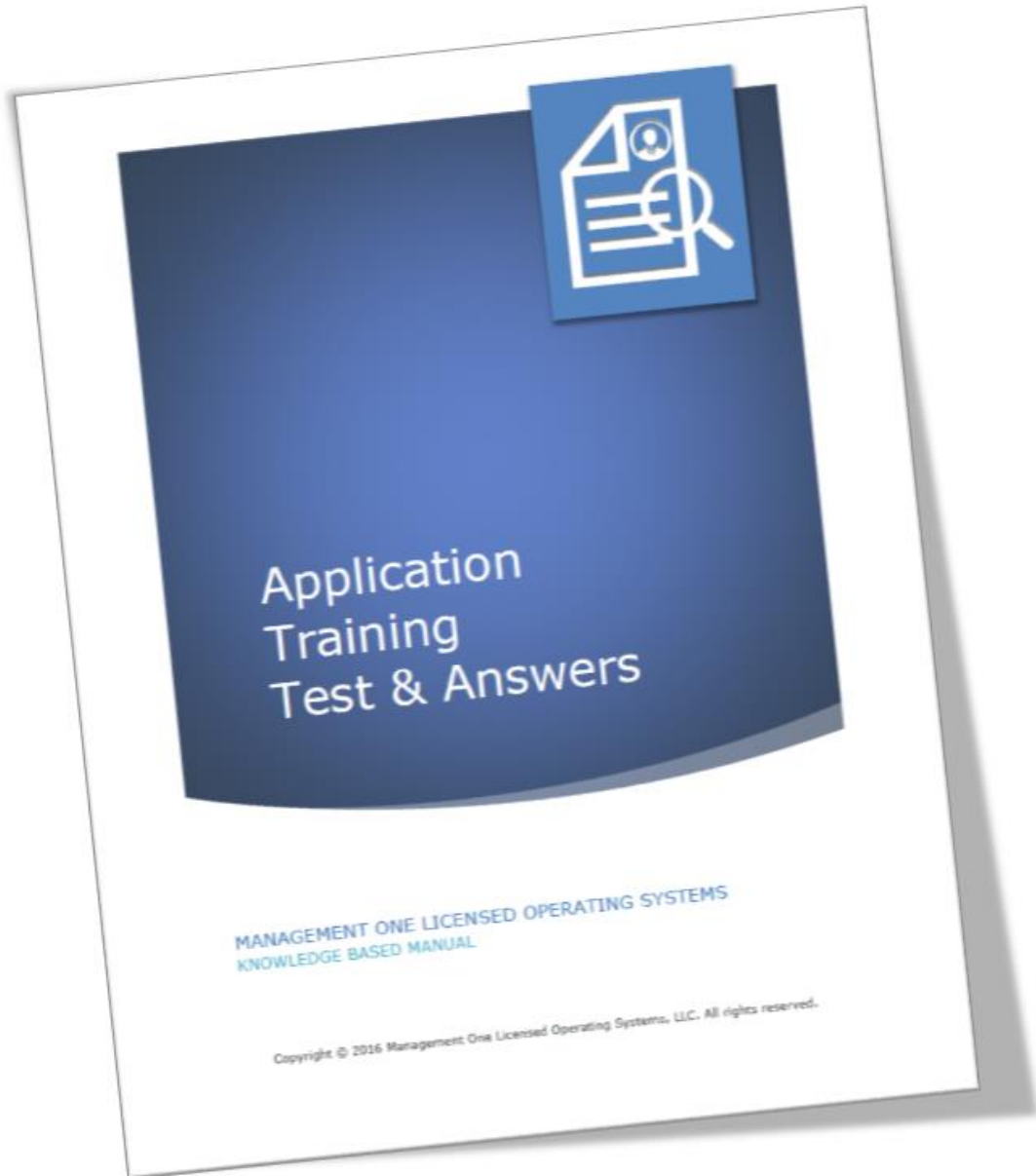
Role play test with manager on all objections and alternative of choices

Retake any test to be at 90% or better

## Application Training Test & Answers

[Click Here to Download MS Word .docx file](#)

### Test - Application Training



## Leasing Stadium Speech for New Owners

[Click here](#) to download and customize your speech.

Sample:

Hello Mr./Ms. (Owner)

My name is <Leasing Consultant at "Company Name"> I want to welcome you to "Company Name"!

The reason for my call today is to welcome you to "Company Name", introduce myself, and take a minute to explain how we work and what I'll be doing in the coming weeks in order to get your property rented as quickly as possible to get you some cash flow coming in.

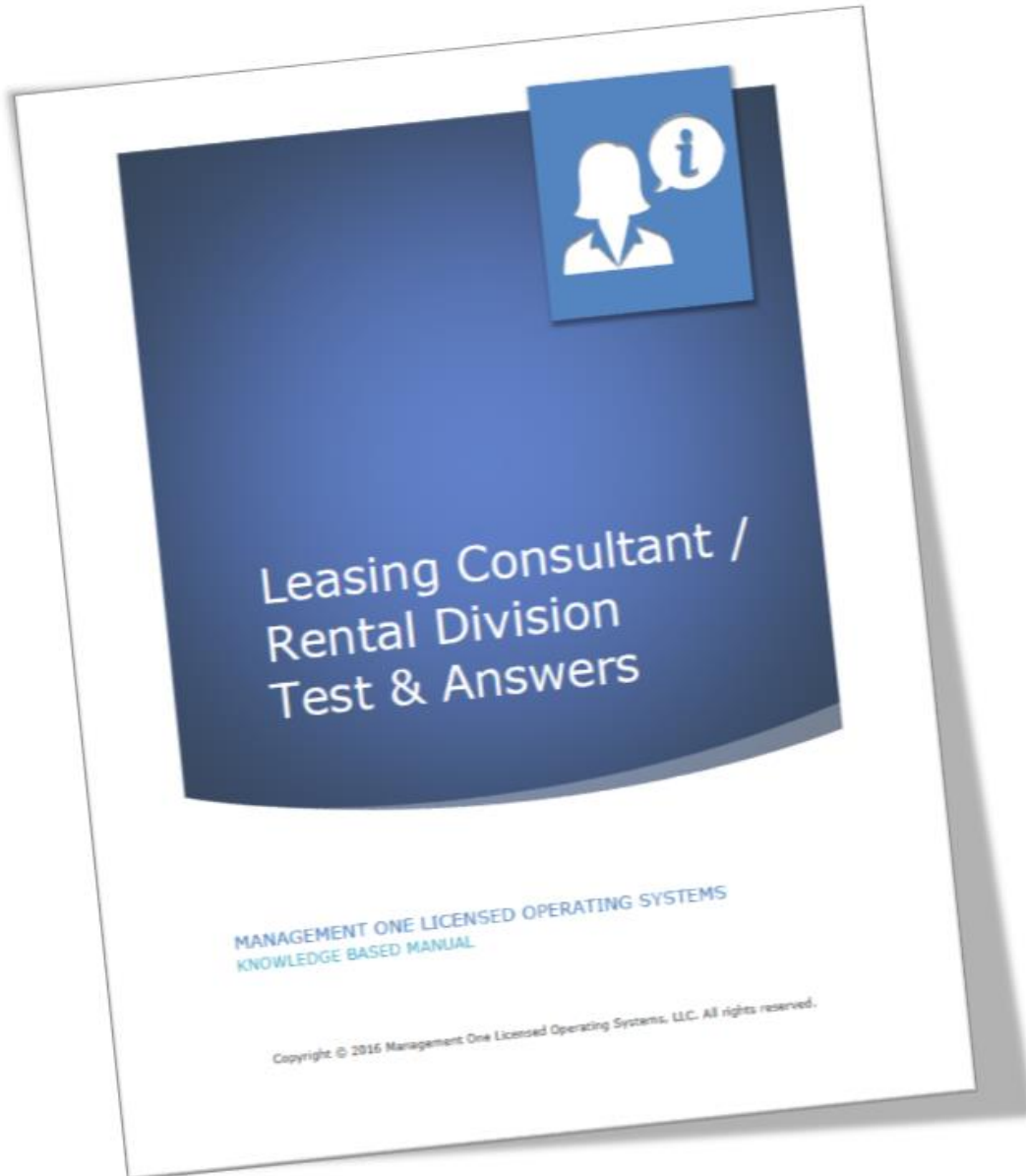
- First off I wanted to let you know "Company Name" has been in business 29 years, and we have leased over 10,000 homes. So we know our market, and we understand what it takes to get your property into rentable condition, as well as getting them rented as quickly as possible.
- We list your property on over 40 real rental sites online in order to get maximum exposure on your property for the quickest turn around, as 60% of the market is shopping online these days.
- We have an excellent screening process, as it is my duty to find you the right type of resident, and not just the first person interested. We screen for credit, income, as well as renter history, just to name a few.
- I can process applications within 24 hours, and make it hassle free for the resident. As they will work directly with me from the time they walk in the door, to the time I hand them keys.
- I will update you on your property every Thursday, and give you the type of activity, current rent rate, as well as any feedback I am receiving from showings, be it positive or negative.

Is there anything else I can answer for you, while I have you on the phone? Have a wonderful day Mr./Ms. Smith; I look forward to speaking with you on Thursday.

## Leasing Division Test & Answers

[Click Here to Download MS Word .docx file](#)

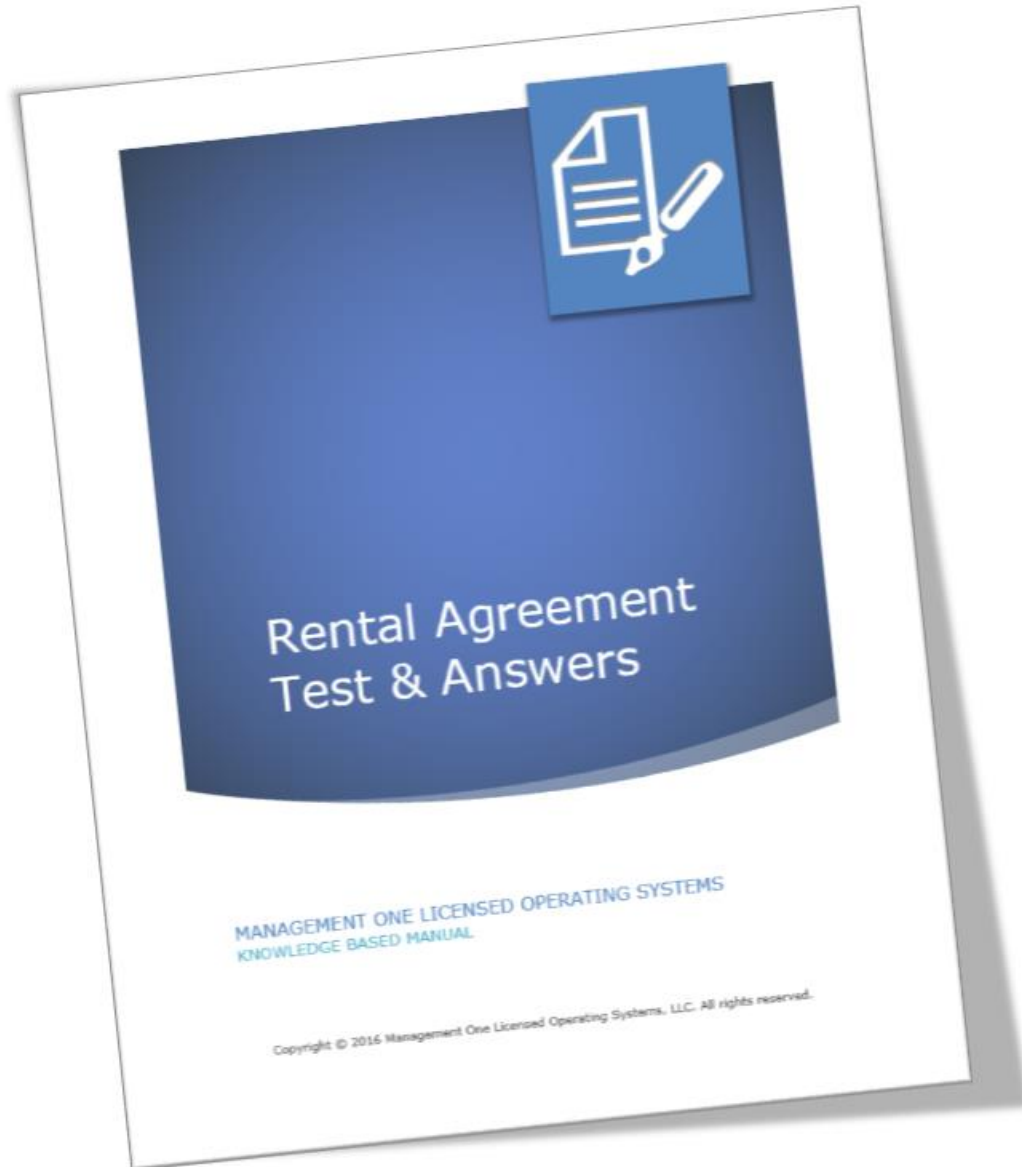
### Test- Leasing Division



## Rental Agreement Test & Answers

[Click Here to Download MS Word .docx file](#)

### Test - Rental Agreement



# Maintenance Division

## Property Inspector / Maintenance Salary and Bonuses

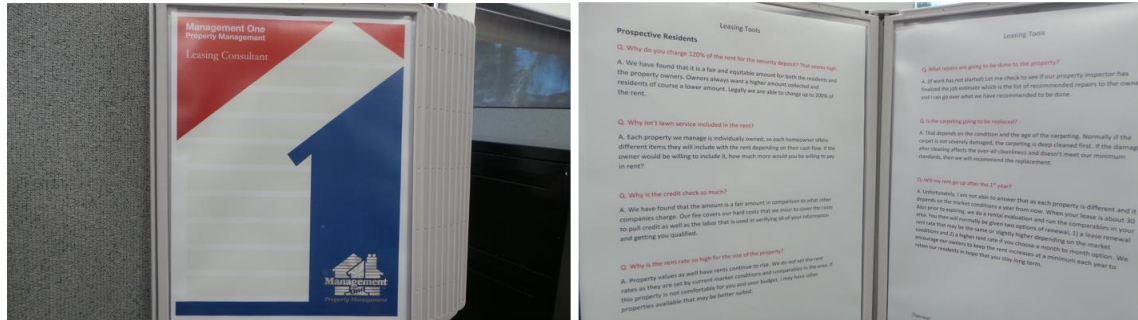
### Spreadsheet - Maintenance PI salary and bonus Sample

Property Inspector					
Example					
Base ( Range 1800 to 2800 )		\$	-		
Gen Bus Bonus ( Starts in 90 days) <i>(See Gen Bus for Qualifications)</i>		\$	250.00		
Personal Bonus ( Start in 90 days) <i>(DTC must be 16 days or less to qualify)</i>		\$	250.00		
Medical - Est ( Starts in 90 days)		\$	150.00		
Retirement - Est (Starts after \$5000 is earned)		\$	75.00		
Reimburse for mileage - If your per car is used		?			
<b>Total compensation package</b>		<b>\$</b>	<b>725.00</b>		
Time and half paid for overtime on wk end/even		?			

# FAQ- Frequently Asked Maintenance Questions and Answers

[Click Here to Download MS Word .docx file](#)

## Quick Reference Flip Chart



It is recommended that the following Frequently Asked Questions are printed and displayed in a Hanging Flip Chart in the Station or Cubical of the Maintenance Division for Quick Reference.

This way the information is not hidden on the computer somewhere and it gives any new person the advantage they need for quick responses as well as providing superior customer service as they appear very knowledgeable from the very first day.

[Click Here to acquire your own "Wall Reference Organizer"](#)

## The First 100 Days for Property Inspector / Customer Service

[Click Here to Download as a Checklist](#)

### 0-30 Days

#### **Property Inspector / Customer Service Job Description**

[100 Most Asked Questions at Management One Test](#)

[M1 software training 40 min](#)

[One Touch system](#)

[Read Training Manual](#)

[Watch all Property Inspector Videos](#)

Learn operations algorithm 17,15,12,8

[Learn \(ILR\) Internal Leasing Report](#)

[Learn \(LMS\) Leasing Management Status](#)

[Learn \(RML\) Resident Move In Ledger](#)

[Take Management Agreement test](#)

Take Rental Agreement test

[Key Board training](#)

Schedule Already rented signs to go up and Install

[Monthly exterior driveby inspections](#)

[Violations to residents](#)

[Call owners for funds needed for repairs](#)

[Van organized, stocked & clean at all times](#)

Log & keep current inventory for signs & lockboxes

Reports - daily, weekly, monthly

[Take all general maintenance requests from residents](#)



Follow up on all estimates to owners/residents/Vendors using default letters

Proof general maintenance invoices before payment

[Schedule Annuals Inspections](#)

Post violations & follow up on them

Make Keys on Key Machine

Make out Invoice on keys made

[Maint Price List Training](#)

General maintenance test

### **31-60 Days**

<i>In Process</i>	<i>Completed</i>	<b>Property Inspector / Customer</b>
<b>Service Job Description</b>		

[Schedule FWT for owner/resident move outs](#)

[Work up job estimates after FWT](#)

Work with vendors on coordinating work to get completed by deadline

[Issue work orders for rehab maintenance to vendors](#)

[Schedule Final walk thru](#)

[Move in inspections with residents](#)

[Annual inspections / type up report to owner, issue work orders](#)

Monthly van service

[Post 3-Day notices](#)

Take photos of properties up for rent for website

Issue general maintenance work orders on annuals

[Perform Annual Inspections](#)

Process BOM properties

## 61-100 Days

*In Process*

*Completed*

**Property Inspector / Customer**

### **Service Job Description**

Lockouts with sheriff on evictions

Assist in showing properties for Leasing

[Purge all work orders to be close out within 45 days of issue](#)

Assist with security deposit disputes

Post 24 hr notices

[Property Inspector Test](#)

Retake any test to be at 90% or better

## Property Inspector / Maintenance Division Test & Answers

[Click Here to Download MS Word .docx file](#)

### Test - Property Inspector / Maintenance Division



## PI Stadium speeches

### PI Stadium speech for new owners

[Click here](#) to download and customize your speeches.

Mr/Ms (Owner),

My name is <PI at "Company Name" > the property inspector in our Maintenance department.

The reason for my call is go over the different type of inspections I do on your property. I am the eye in the sky so to speak on your property to make sure residents stay in compliance.

I do a total of 5 different inspections at different intervals that consist of:

- I installed the For Rent sign and asses the landscaping
- A Rehab inspection and process to get your property rent ready when it becomes vacant with a complete itemized Job Estimate - I will be e-mailing you out information on how this process works shortly.
- A move in inspection once the resident moves in
- A pre-move out inspection which is optional if the resident wants it
- A 10-15 page annual written report with photos and any repairs or improvements to the property that is mailed to you annually
- A monthly exterior inspection with a front photo we keep on file and any violations I serve on the resident you are e-mail and then when it's resolved I e-mail you again with photos

I am normally in the field until 3 or 3:30 every day so when e-mailing or calling it's best after that time of day.

### Stadium speech via e-mail for new and current owners. (Include flow chart graph)

Mr/Ms (Owner),

My name is <Pi at "Company Name"> the property inspector in our Maintenance department.

The reason for sending you this information is go over the exact process we will go through when your property is or becomes vacant. My number one job is to get you cash coming back in on your property

ASAP and in order to do that we have a very specific process and I need to be in close communications with you during the process.

There is an 11 step process that we will be going through to get it rent ready for the next resident. The time frame to complete these 11 steps ranges from 8 days to 30 days depending on a number of factors. So time becomes your enemy and no cash flow during vacancy as it can cost you anywhere from \$50 to \$100 per day it's vacant. Therefore if it extends out 2 weeks that's up to \$1400 you could lose in just rent.

Options A) - "Company Name" Contractors doing the repairs - 8-12 Calendar days

- If you have us do the work with "Company Name" contractors who are on a fixed maintenance prices.
- If funds that are needed up and above the residents Security Deposit deductions, fund would be need to be e-mailed in within 24 hours or less so we may keep to our time line for you.

Options B) - You or your contractor doing the repairs - 20-30 Calendar days

- You would give us a date in writing that you will have the property in rent ready condition by X date. There is a rehab maintenance agreement we have you authorize to do this as we must have certainty of the move in date as our leasing team are renting it based on that date and if it's not ready there could be financial penalties to you and we don't want that to happen and it gives "Company Name" a bad reputation in the community.
- It's important to note that if you do the work yourself you cannot write off on your income taxes except the materials
- Also our experience with rehabbing over 10,000 houses in the last 29 years we find that owners who do their own work or have their contractors do it takes them 2-3 times longer so in dollars that could be \$1400 to \$2800 in just lost rent.
- In a number of cases the vacancy cost is more than the cost the repairs.
- Also please note that after your home has been vacant over 30 days, if some items are stolen your insurance will not pay for it. Example is your Air Condition Unit outside which could be as much as \$2500 or more, so time again becomes your enemy during vacancy.
- Lastly in Option B you have to manage the work or do the work. "Company Name" makes NO PROFIT on maintenance so it doesn't

matter to us who does the work but it could affect you in a number of ways as I've just talked about here in this process.

The first step will be for us to do physical inspection of your property within 48 business hours from when your previous resident turned in keys to our office or you move out should you be renting your property for the first time. This 180-point inspection includes me videotaping each room and photographing any damage that the resident caused while they resided in your property takes about 1 ½ to 2 hrs. for us to complete just this task.

Secondly, I will work up a job estimate which take another 1- ½ hrs. and send it to one of our preferred contractors who will walk the property within 24 business hours and send it back to me. We have fixed prices which our contractors agree on one year advance. Once I receive their notes back from their inspection and any estimates we may need that aren't on our price list like trimming a tree. I will then compare them to my inspection and make any adjustments.

I will then email this to you for you to review along with your options and we recommend that you circle any items in question so when I can you we can easily reference them. I will also call you the same day I send it to you unless, it was late in the day, in which case would be the next day normally after 3pm as I am in the field earlier in the day.

Once we complete discussing the items you would need to select Option A or B. If you select Option A you would e-mail us a check for the entire amount of the rehab. The funds are kept in a non-interest bearing trust account as the contractor receives no funds up front except in special circumstances. We issue work orders that day in most cases unless it's at the end of the day and then if the work is under \$4000 or less our repairman will be complete the work in 4 business days (Mon-Fri). Our contractors can complete \$1000 worth of work again on average. Please note that during the rehab process the contractor may find other things that need to be repaired so there may be a variance of 15% of this estimate. If anything is to go over \$250 in total we will contact you immediately before doing the work.

If you select Option B I would have you authorize our Rehab Maintenance Agreement with a firm completion date and have you e-mail it back to me within 24 hrs. Without a completion date in writing we are unable to show your property for rent since we have no firm date to give prospective residents therefore essentially your property is temporarily off the market and this will affect your cash flow significantly.

The final step of your rehab will be me going back out to the property and doing a final inspection whether we do the work or you or your contractors do it. This is to check that the item was completed, the contractor used quality materials and the workmanship was satisfactory. If any recalls are needed I take care of that as well. In addition I videotaping each room of your property so we have specific evidence should we need it when the next resident moves out or for insurance purposes.

Once this has been completed I will then notify you via email letting you know that your property is completed and ready for the NEW resident to move in.

## FAQ

**Q.** Why do I have repair cost right after a resident moves in even though I just paid for an extensive rehab that cost me thousands.

**Ans.** The last 30 days the current resident is at a property 99% of them will not call in repairs that are needed as they don't want to take time away from work to meet the contractor. For example, an oven or microwave that isn't working When we inspect the property it's not practical to cook something in either. Also a Dishwasher while we turn in on to see that it functions we don't know if it dry's the dishes properly. In addition we flush a toilet once compared to a family might be 10-20 times a day and the toilet mechanism will work differently under that capacity. And there are numerous other items as well that you don't find until you actually live in the home. This is why after a new resident moves in you will see repairs that are needed.

**Q.** Why can't I have 3 estimates like other companies have given me?

**A.** Traditionally that's what all management companies but after we had done thousands of rehabs we found our owners were losing millions of dollars in vacancies so we decided to do the estimates up front a year in advance with selected contractors so everyone agrees up front to a competitive price that works for both parties and eliminate 2-3 weeks in vacancies. By doing it our way you will save up to \$1400 in just eliminating a vacancy.

**Q.** Does "Company Name" make a mark up on repairs.

**A.** No, "Company Name" is one of the few companies who do not make a mark up and the only company that we know of that has set prices.

**Q.** Does the contractor get any money up front when I send you the full amount?

**A.** NO, they must complete all the work first and then after we inspect they get paid. There are some exceptions on big jobs where we have to special order materials.

## New Property Accounts Division

### New Property Account Rep Salary & Bonus

#### Spreadsheet - New Property Accounts Salary and Bonus Sample

Compensation Plan					Monthly	Annually
<b>Position : New Property Accts / Marketing</b>						
<b>Salary Base - No overtime Paid - (Range 2000-3000)</b>					\$ -	\$ -
<b>Bonuses</b>						
Accts Signed Per Mo	Paid Per Door	Total For Month	Lowest	Highest		
0-4	0	0	0	0	\$ -	\$ -
5-9	\$50.00	\$250.00	\$450.00		\$ -	\$ -
10-14	\$75.00	\$750.00	\$1,050.00		\$ -	\$ -
15-19	\$100.00	\$1,500.00	\$1,900.00		\$ -	\$ -
20-24	\$125.00	\$2,500.00	\$3,000.00		\$ -	\$ -
25-29	\$150.00	\$3,750.00	\$4,350.00		\$ -	\$ -
30-34	\$175.00	\$5,250.00	\$5,950.00		\$ -	\$ -
35-39	\$200.00	\$7,000.00	\$7,800.00		\$ -	\$ -
40 Plus	\$225.00	\$9,000.00			\$ -	\$ -
Medical - Est					\$ 150.00	\$ 1,800.00
Retirement - Est					\$ 241.00	\$ 2,892.00
Company Car - Sfter 30 days - Incl fuel, repairs, insurance					\$ 500.00	\$ 6,000.00
Cell phone provided					\$ 100.00	\$ 1,200.00
Laptop provided					\$ -	\$ -
Total compensation for accessories					\$ -	\$ -
Compared to Real Estate you have no overhead					\$ -	\$ -
<b>Total Possible Income for the year with Salary, Bonuses and Compensation plan</b>					<b>\$ 991.00</b>	<b>\$ 11,892.00</b>
<b>Other:</b>						
Lead Generation staff provided at company cost						
Year # 1 - One week paid vacation						
Year # 2 and there on - 2 weeks paid vacation						
Salaried employee						
Many Saturdays for a few hours will be required the first 6 months and some after that from time to time						
Real Estate License must be held under Management One and no outside selling permitted						
Paid Holidays ?						
Notes: Goals and bonuses are subject to change annually.						



# New Properties Account Rep Job Description & Expectations

## Job Description

### Job Desc

#### New Accounts/Sales Job Description

Take/field new NPO calls  
Follow call procedure - follow up calls, website info, etc.  
Schedule appointments to meet prospective owners to sign up  
Do sales presentation with prospective owner and sign up account  
Real Estate office presentations - get referrals, build relationships  
New tract visits - get referrals, build relationships  
Deliver referral checks to real estate agents  
Assist in marketing campaign  
Work up CRA's for prospective owners  
Work up CRA's for current owners-assist  
Prep/send new sales info to prospective owners  
Reports - weekly & monthly  
Agents appts face to face each month with PPT 2 a day average - 44 a month  
( lead generation person to generate most Agent appts)  
Investor Groups - Once a month meeting  
Board of Realtors once a month each office in all 3 cities  
Visit each Real Estate office once a month with information in each office  
Follow up NPO's Each day from 9-10 am -Must be called each day  
Take all new NPOS calls and return call within two hours  
Two thank you notes a day

## Hours Breakdown

### Hours Breakdown - New Accts

Note: Some appts you will sign two accounts & some you will get an owner ref for another ppty of theirs to manage  
 The following is just a guideline. As software is more automated processing time will decrease.  
 150 referral calls is about the maximum one associate can service

		Appts	Hours to complete these task
Referral calls per month	150		
Process time 20 min each			60 hrs
25% - 30% you should get a appts with		37 -----	
Pres with owner face to face - (Drive time incl)	2hr	17	34 hrs
Pres with owner internet	1 hr	20	20 hrs
Pres with agts- Face to face	1 hr	22	22 hrs
Pres with agts - Internet	1/2 hr	11	6 hrs
Process paperwork on new accounts	20 min	12	12 hrs
Visit Real Estate offices once a month	1/2 hr	20	20 hrs
Calling NPO's each day	1	22	22 hrs
Board of Realtors once a month in each board	3	3	3 hrs
Investor Groups	3	3	3 hrs
Total Approximate hours per month			202 hrs
Per week			50.5 hrs

## Expectations

### **Expectations:**

In the first 90 days of ramp up time average 10 a month  
After 90 days to 180 days 15 per month  
After 180 days 25 per month  
After 9 months 30 per month

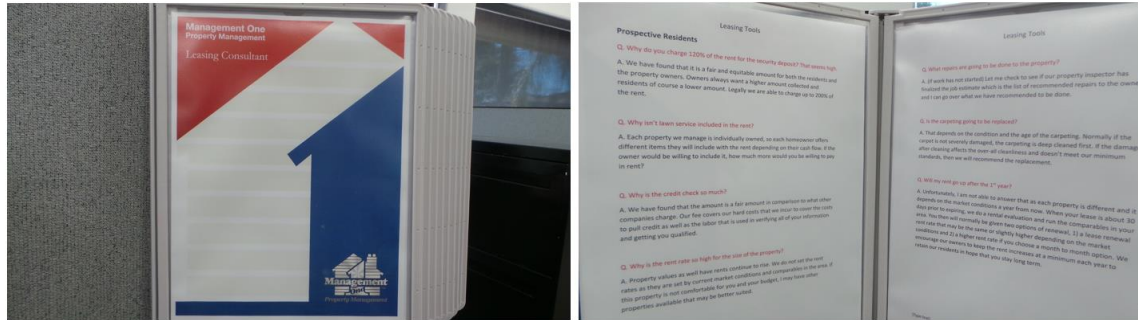
#### Marketing Implementations:

Presentations with Brokers/Agents one on one and RE office presentations  
Attend Board Meetings once a month  
Hand deliver Broker/Agents referral checks with balloons, coffee cup  
Attend Investor Seminars to provide property management information

# FAQ- Frequently Asked New Account Questions and Answers

[Click Here to Download MS Word .docx file](#)

## Quick Reference Flip Chart



It is recommended that the following Frequently Asked Questions are printed and displayed in a Hanging Flip Chart in the Station or Cubical of the Leasing Consultant Division for Quick Reference.

This way the information is not hidden on the computer somewhere and it gives any new person the advantage they need for quick responses as well as providing superior customer service as they appear very knowledgeable from the very first day.

[Click Here to acquire your own "Wall Reference Organizer"](#)

## The First 100 Days for the New Property Accounts Representative

[Click Here to Download as a Checklist](#)

### 0-30 Days

#### **New Property Accounts Job Description**

[100 Most Asked Questions at Management One Test](#)

[M1 software training 40 min](#)

[One Touch system](#)

[Read Training Manual](#)

[Watch all New Property Account videos](#)

Learn operations algorithm 17,15,12,8

[Learn \(ILR\) Internal Leasing Report](#)

[Learn \(LMS\) Leasing Management Status](#)

[Learn \(RML\) Resident Move In Ledger](#)

[Take Management Agreement test](#)

Take Rental Agreement test

[Objections- know them word for word](#)

Role Play

[Learn New Property Account Presentation](#)

Give New Property Account presentation to management

[New Property Account Lead Acquisition Process Flow](#)

[Daily Schedule...Typical](#)

[\(NPO\)- New Prospective Owner Form](#)

[New Prospective Owner Call](#)

[Comparative Rental Analysis](#)

[NPO- Second Call Script](#)

[Good Faith Estimate](#)

[Email For Sales](#)

[Signing Up a New Account - Sign Up Packet](#)

[Hot Buttons](#)

[Rating System](#)

[Turbulences](#)

[Direct Deposit](#)

[Landlord / Resident Insurance](#)

[Sales Tools](#)

### **31-60 Days**

#### **New Property Accounts Job Description**

[Process of a New Prospective Owner](#)

[Client Protection Contract to Real Estate Agent for Owner Referral](#)

[Referral Cards](#)

[Letter to Owner For Referral on...](#)

[2 Minute Elevator talk](#)

[5 Minute Stadium Speech](#)

[Reports](#)

[Monthly Goals](#)

[Do a Internet Presentation with an owner with management present](#)

Do a presentation to owner with management present

Go to board of Realtors

Market to Real Estate office and Mortgage Brokers

Assist setting up presentation with management for Real Estate offices

Do one on one presentation with agents, brokers, managers

## 61-100 Days

*In Process*

*Completed*

**New Property Accounts Job**

### **Description**

[Client Registration and Property Checklist](#)

[Take New Account test , Includes Objections test](#)

Do internet presentation by yourself

Do face to face with owner by yourself

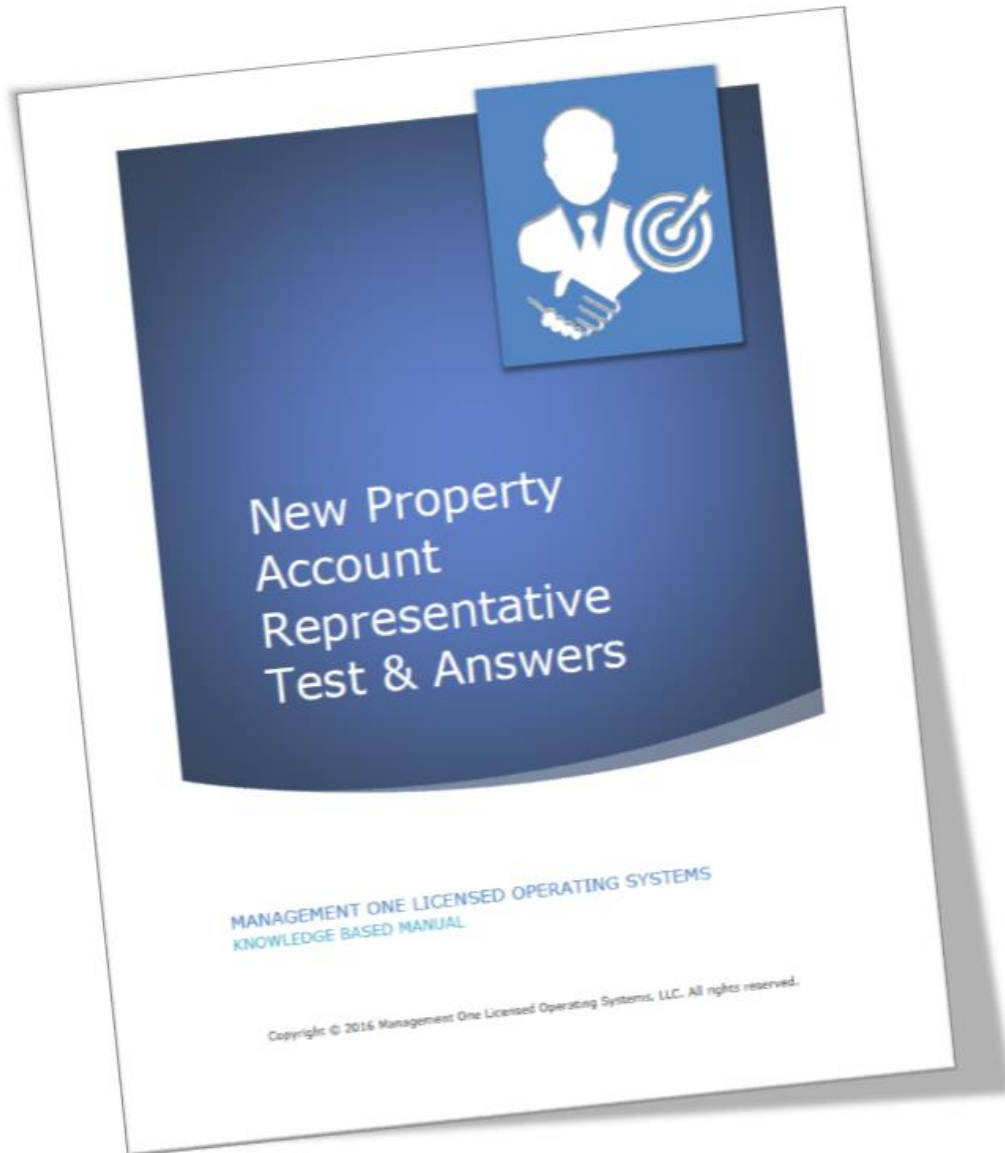
Do office presentation at Real Estate offices

Retake any test to be at 90% or better

## New Property Account Representative Test & Answers

[Click Here to Download MS Word .docx file](#)

### Test - New Property Account Representative





## Process of a New Prospective Owner

1. Leads come in via phone or e-mail
2. Return the call using the general outline script
  1. Ask if they have viewed the 7 slide presentation on the website
  2. Bring up NEW NPO in M1 Solutions Software
  3. Use outline to diagnosis, find the pain, and make it terminal-  
Provide a solution to get the appointment
  4. Place info into NPO within M1, while you are talking and use script on NPO in M1 Solution Software.
  5. Set appointment to call them back to go over the CRA (DO NOT SEND)
  6. E-mail them links in this order.....
  7. [E-1 from NPO](#) in M1 Solution Software, this Links to owner testimonial page and video you provide in your website.
  8. Also your and PDF Brochure they can view on line or print out. (Even if they saw the brochure online it's good to send it again, as it will show in the notes that it was sent) See Example click link <http://moreno.managementone.com/management-services>
3. Call back same day or next day to review the CRA and set appointment to conduct an online presentation. This allows you to discuss with them the value of your services and to show them exactly what is done for the management fee. (Use PPT Pres ) If you set the appointment send the following:
  1. [Send E -2](#) from your NPO which is a link to your sample management agreement and a list of the items they will need to have for your appointment so you can sign them up.
  2. Consider including an article pertaining to current market conditions. These articles can be found on Google.

### **If you don't set the appointment:**

1. Send e-mail [E-2B](#) from your NPO screen.
2. Call 2 days later and attempt to set the appointment to go see them and sign. If you do not reach them leave voicemail and send e-mail from NPO labeled General E-mail.
3. Call again 2 days later and attempt to set the appointment

Call 7 days from the first call, if no answer leave message and send [E-3](#) from NPO and disable in NPO

*Sample voice mail verbiage...*

Hi John, I left a couple of message *or e-mails* and have not heard back from you, so at this point I will leave it up to you to get back to me if you require our services. If I don't hear from you I will assume that you've made other arrangements, however we will add you to our e-newsletter filled with helpful tips about managing your property, and if we can be of help to you now or in the future please call me at 999-999-9999.

1. Once a month you will transfer them and their e-mail into a drip system until they either decide to do business with you or ask to be removed or the remove themselves. What you send them will be covered is marketing.
2. If you set the appointment complete the prep for the appointment. (This can be done in 5-10 min)

At the appointment

1. Take photo of front of property in daylight with your tablet
2. View property with prospect.
3. Take photos for advertising
4. Fill out amenities
5. Fill out 4 quadrants labeled hot buttons, leasing, rehab, accounting. You're setting up the file and property on your first visit, don't let them rush you tell them you will be typing to make sure you don't forget anything about their property that would make it rent quickly.
6. Do PPT Presentation at Kitchen table and go over management agreement and all ancillary paperwork

(You will go over the management agreement as you do the PPT presentation for better closing ration and time efficiency)

1. Once they sign the management agreement follow the check list which will consist of keys, etc

2. Double check NPO in amenities get all the details from the owner
3. You're done!

# NPO- New Prospective Owner

New Properties and Prospective Owners are added into the system through the Prospective Owner Detail [Click here to Watch Video Tutorial](#)

## Filling out the Prospective Owner Detail

**Prospective Owner Detail**

BACK PREVIOUS ITEM NEXT ITEM TRAINING CMD CTR ADD PPTY TO OPS CRA'S MGT AGMT NEW CRA NEW PROSP OWNER SCRIPT

**Prospective Owner Information**

NPO information saved!

Search Last Name Existing Owner (1) Search SELECT FROM LIST View

First Name	Last Name	Email Address	Drivers License	SSN	Cell Phone	Home Phone	Work Phone

Mailing Street Num. Street Name Unit City State Zip (2)

Next Call Appt. Date Appt. Time Appt. Status Status User Save (4)

**Subject Property**

Street Number	Street Name	Unit	City	State	Zip	County	Mapgrid

Save (6)

**Motivation and Referral Information**

Motivation Rent Desired Rent Qt. High Rent Qt. Low  
 \*SELECT FROM LIST\* 0.00 0.00 0.00 (7)

Referral Type Referral Source \*\* Referral Info. Referral Fee  
 \*SELECT FR... 0.00 Save (9)

**Email Management**

E1 E2 E3 Management Agreement General Email Notify New Accounts Send Email

**Notes**

Add Note

**Listing Details**

Hot Buttons / Advertising (12) Leasing Disclosures (1500 chars max)

Rehab (1500 chars max) Accounting (1500 chars max) Save (15)

**Upload Files**

Select File Property Photos NPO Documents  
 Browse... Upload Upload (14) (15)

**Rating Survey** (16)

Condition of Neighborhood	0	Notes
Overall First Impression - emotionally	0	
Front Landscaping	0	
Overall Front Exterior / Driveway / Garage Door	0	
Condition of Appliances / Cabinets / Blinds / Screens	0	
Condition of Flooring	0	
Condition of Paint	0	
Interior Condition / Cleanliness	0	
Rear Landscaping / Patio	0	
Overall Rear Exterior	0	

Signature  
 Rating 0% Save (17) Print Preview

**Property Amenities And Utilities**

Save (10)

CODE	VALUE/DESCRIPTION	WEB
Age of Property		
Square Footage		
# of Stories		
Bedrooms		
Bathrooms		
Fireplace		
Flooring		
Carpet		
Car Garage		
Family Room		
Patio Slab		
Patio Covered		
Central Air/Heat		
Dishwasher		
Microwave		
Range		
Garbage Disposal		
RV/Boat Parking	N	
Lawns in		
Pool		
Spa		
View		
HOA		
Perm Front Lawn		
Perm Front/Rear Lawn		
Temp Front Lawn		
Temp Front/Rear		
Washer/Dryer Hook Up		
Wash/Dryer Included		
Alarm		
Electric		
Water		
Gas		
Pets Allowed		
Cross Street		
Lawn Service	N	
Lease Term	12 months	
Citycode		
Rental Code		
Pool Service	N	
Mailbox #		
Deck		
Maximum Occupancy		
# of Garage Remotes		
Refrigerator		
Gate Code		

Save (11)

From the Tree View:

1. Expand **Owner**
2. Select **Add Prosp. Owner**
3. Fill in **Prospective Owner** Information (**First Name, Last Name, Email Address, Cell Phone**, etc.)
4. Then click **SAVE**
5. Fill in **Subject Property** information (**Street Number, Street name, Unit, City, State, Zip**, etc)
6. Then click **SAVE**
7. Select **Motivation** from Drop-down menu
8. Select **Referral Type\*\*** from Drop-down menu
9. Then click **SAVE**
10. Add any **Amenities** that you can (the highlighted items in yellow are amenities needed to complete the Rental Analysis)
11. Then click **SAVE**
12. Add any **Listing Details** that pertain to the property
13. Then click **SAVE**
14. Attach photos by clicking **Browse**, select the file, then click **Property Photos UPLOAD**
15. Attach documents by clicking **Browse**, select the file, then click **NPO Documents UPLOAD**
16. Fill out the **Rating Survey**, (if you wish to rate the property with the client, and then have them acknowledge by signing)
17. Then click **SAVE**

Note:

\* If the prospect is an **Existing Owner** or **Prior Owner**, select from the drop down, then Click **VIEW**

\*\*If the referral person is not in the system you can click **Referral Source** link to add them, afterward you will revert back to the Prospective Owner Detail screen, which you were filling in.

## New Prospective Owner Call

### Dialogue/Script & Documentation when a prospective client calls:

#### Initial Call Outline

#### **INITIAL CALL OUTLINE**

**Greeting** "They don't care how much you know until they know how much you care"

1. Put at ease (smile before taking the call)

To control the call you use the 3 F's (feel, felt, found) and BTW (By the way)

- **Get initial information** as to why they are calling
- **Develop relationship**
  1. Ask where property is
    1. Make them feel it's a good location (*all locations have something good about them*)
    2. Express that **< Your Company Name >** services other clients in their area
  2. Ask how they came about to own it or if they are renting out their existing home ask them why they are wanting to rent it out

*(let them tell their story- you're building a relationship here)*

- **Compliment/commiserate with them**
  1. Investment compliment
  2. Moving congratulate/compliment
  3. Personal life change and have to move & rent commiserate
- **As your creating this dialog you need to be conscious of the following:**
  1. **Diagnosis** (*Listen twice as much as you speak*)

2. **Find their pain** (*Exam- Resident leaves in middle of night or damages the property*)
3. **Make it terminal** (*Exam- Some people take 9 months to get the resident out*)
4. **Give them the solution** (*Which one of Your services will take away their pain.*)

- **Information Contact**

1. Ask for email address to send brief summary of this call
2. Follow-up Commitment
  1. Will provide competitive analysis at that time (this is key to getting the 2nd call with them **(Do not send them the CRA)**)
  2. Get specific day/time they agree to the follow-up call next day

- **Reconfirm** follow-up call day/time and that we will have researched their home's area by then and can provide a CRA rental rate.

Items A to D maybe something you go into when you have the second call, however if it's an seasoned investor you may go into it in the first call.

### **NPO Initial Call Script**

Click here for the [NPO Script](#). Download the scripts and personalize them for your company.

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Have your NPO in the M1 software up and ready to fill out before you take the call. Should you get the call without notice ask the caller to hold for 30 seconds and bring it up on your computer.

Taking a call as it comes is.

## Key Verbiage to Use

- Story of driving by a police HQ at the speed limit as an example to increase resident **Accountability as they know someone is watching**
- Forget about saving \$8.00 on faucet and 2 hours at homes depot and go to a financial seminar to learn how to get better loans at a lower rate, eliminate you MMI Insurance
- You pay a management fee whether you use a management company or self-manage!
- Since we can rent it faster and for more and keep a resident in and reduce your vacancy, your management fee - after tax write offs - is the same as you're paying now managing yourself, **plus** you don't have to look at better and more real estate deals because your being "Joe Manager".
- We look at residents as customers not only as a resident, whole different philosophy and approach if you keep a resident happy they stay longer and pay higher rent
- When you give customers good service you can charge more. If you're like me, you will pay per 10% more to some store because they treat you right and give timely services
- Managing a property instead of selling is more than one dimensional, meaning with management the rent rate is based on the condition of the property, quality of the resident, lease term, and security deposit - not just price or rental rate.



## NPO- Second Call Script


This is the follow up call to be made after completing the Comparative Rental Analysis with the sole goal of scheduling the Appointment to Sign up the Account.

### Second Call to go over CRA and Set Appointment



**Management One Moreno Valley**  
Moreno Valley, CA 92553  
Phone:                      Fax:

**Comparable Rental Analysis**  
Prepared For:                        
Prepared On: 12/4/2016  
Prepared By:                        
Phone:                                
Email:

Subject Property	Comparable 1	Comparable 2	Comparable 3																																																																																																																																																																																																																																													
<p><b>Perris CA 92671</b></p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: 8px;"> <tr><th>Description</th><th>Value</th></tr> <tr><td>Square Footage</td><td>1853</td></tr> <tr><td>Bedrooms</td><td>4</td></tr> <tr><td>Bathrooms</td><td>3</td></tr> <tr><td>Carpet</td><td>None</td></tr> <tr><td>Car Garage</td><td>3</td></tr> <tr><td>Patio/Slab</td><td>Y</td></tr> <tr><td>Central Air/Heat</td><td>Y</td></tr> <tr><td>Patio Covered</td><td>Y</td></tr> <tr><td>Pool</td><td>N</td></tr> <tr><td>Spa</td><td>N</td></tr> <tr><td>View</td><td>N</td></tr> <tr><td>Lawn Service</td><td>N</td></tr> <tr><td>Pool Service</td><td>N</td></tr> <tr><td>Location</td><td></td></tr> <tr><td>Make Adjustmen</td><td></td></tr> <tr><td>PPTY Condition</td><td></td></tr> <tr><td>Age of Property</td><td></td></tr> <tr><td>Flooring</td><td></td></tr> <tr><td>R/Visual Parking</td><td></td></tr> <tr><td>Avg Rent</td><td>\$1,723.20</td></tr> <tr><td>Start Rent</td><td>\$1,823.20</td></tr> <tr><td>Low Rent</td><td>\$1,623.20</td></tr> <tr><td>Avg Days to Rent</td><td>43</td></tr> </table>	Description	Value	Square Footage	1853	Bedrooms	4	Bathrooms	3	Carpet	None	Car Garage	3	Patio/Slab	Y	Central Air/Heat	Y	Patio Covered	Y	Pool	N	Spa	N	View	N	Lawn Service	N	Pool Service	N	Location		Make Adjustmen		PPTY Condition		Age of Property		Flooring		R/Visual Parking		Avg Rent	\$1,723.20	Start Rent	\$1,823.20	Low Rent	\$1,623.20	Avg Days to Rent	43	<p><b>Perris CA 92671</b> Rent: \$1,525.00</p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: 8px;"> <tr><th>Description</th><th>Value</th><th>Adj.</th></tr> <tr><td>Square Footage</td><td>2000</td><td>(\$29.40)</td></tr> <tr><td>Bedrooms</td><td>3</td><td>\$30.00</td></tr> <tr><td>Bathrooms</td><td>2</td><td>\$25.00</td></tr> <tr><td>Carpet</td><td></td><td>\$0.00</td></tr> <tr><td>Car Garage</td><td>2</td><td>\$25.00</td></tr> <tr><td>Patio/Slab</td><td>N</td><td>\$20.00</td></tr> <tr><td>Central Air/Heat</td><td>Y</td><td>\$0.00</td></tr> <tr><td>Patio Covered</td><td>N</td><td>\$20.00</td></tr> <tr><td>Pool</td><td>C</td><td>\$0.00</td></tr> <tr><td>Spa</td><td>C</td><td>\$0.00</td></tr> <tr><td>View</td><td>N</td><td>\$0.00</td></tr> <tr><td>Lawn Service</td><td>N</td><td>\$0.00</td></tr> <tr><td>Pool Service</td><td>N</td><td>\$0.00</td></tr> <tr><td>Location</td><td></td><td>\$0.00</td></tr> <tr><td>Make Adjustmen</td><td></td><td>\$0.00</td></tr> <tr><td>PPTY Condition</td><td></td><td>\$100.00</td></tr> <tr><td>Age of Property</td><td>2004</td><td></td></tr> <tr><td>Flooring</td><td></td><td></td></tr> <tr><td>R/Visual Parking</td><td>N</td><td></td></tr> <tr><td>Adjusted Rent</td><td></td><td>\$1,715.60</td></tr> </table> 	Description	Value	Adj.	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Read note the figures are based on the following condition:

**CONDITION OF PROPERTY:**

- \*In dde to be painted if needed
- \*Front door and Garage door to be painted
- \*Front and Rear lawn to be in and green
- \*Blinds or window covering on all windows
- \*All items to be functional such as appliances, stove, etc
- \*Property to be professionally cleaned including windows appliances mirrors & carpets must be free of stains

**QUALIFICATION & TERMS OF LEASE:**

- \*Resident must sign a One Year Lease
- \*Resident is required to pay a Security Deposit of 120% of the first month's rent up front before move in
- \*Resident's income must be 3 times the rental rate

Sunday, January 24, 2016
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### Second call...

- **Go over the CRA in detail**
- **Go over 4 main areas we manage**
  1. **Manage the resident** (24/7 on line service, Emergence service)
  2. **Manage the Cash flow** (By raising rents, reducing expense with fixed maintenance costs and residents doing items under \$50)
  3. **Manage the property** (Monthly exterior inspections, Annual inspections, Violations, Maintenance)
  4. **Manage the legalities** (Rental contracts, Evictions and Small Claims Court, Resident damages )
- **Close for the appointment to sign the account.**

*"Let me first preface in saying that the rental numbers that I will be going over are what the rental market says your property is worth.*

*In addition, it's important to note that these rental rates are certified and that our residents have qualified through our stringent qualifying system. We require the resident to sign a one year lease and they also have to place a large security deposit up front.*

*These are not rental rates based on sub-standard residents, month to month rentals, and little to no security deposit. We have to make sure we are matching quality and price, since the rental prices which you see in the paper or on the internet are what we consider to be, 'sticker prices', meaning this is what the owner would like to get and not what they really end up renting for." (No one advertises the home after it rents, so you will not know if it rented for \$200 less from the advertised price)*

**Example:**

*Your property has 2000 sq ft , 3 bed 2 bath 3 car gar.*

*I have 3 properties in the same area as yours they are*

*X Sq Ft*

*X Sq Ft*

*X Sq Ft*

*And they first one rented for X , second X and last one X*

*So the average rent the rental market is saying you property should rent for is \$\_\_\_\_\_, the most the markets days it will rent for is \$\_\_\_\_\_. And the lowest is \$\_\_\_\_\_.*

## **Setting the Appointment**

### **Use "Alternate of Choice"**

*"So, to get your property on the market and have some positive cash flow coming in...which would be better for you, to do an appointment in person or on the telephone? After I e-mail you the paper work, which would be better for you, next Tuesday or Wednesday? Are you available at 1pm or would 4pm better fit your schedule?"*

### **Assume they are ready to set the appointment.....**

*"Okay John on the appointment we will signing the management agreement, I will need your initial deposit of \$ X, that consist of \$ X for maintenance reserve and \$ X for just classified advertising, I would also need keys, garage remotes, transponders, HOA keys set to the property."*

Log in to your NPO when it is time for the appointment and if it's a telephone appointment you will view whatever you would have shown in person on your computer.

**Note:** Make sure you set the appointments on your "Appointment Days" 99% of the time, so you still have days scheduled for Marketing to keep the calls coming in, VERY IMPORTANT!

## **NPO Second Call Script- Discussing the CRA**

Click [here](#) to download the script and customize it for your management company.

## Comparative Rental Analysis

A Comparative Rental Analysis (CRA) is an evaluation of [comparable recently rented properties](#)

Comparables are recently rented homes that are close in proximity, similar in size, room count and style to the subject property.

CRAs are used to get a sense of a fair market rental price to list the property for (when soliciting for a prospective resident), while trying to remain competitive to get the home rented quicker. Thus, generating more capital by reducing vacancy time.

### How to Complete a CRA

In a CRA, the home you want to rent out is your **Subject Property**, and the rented homes to which you are comparing it to are [Comparables](#). Homes of similar size, condition, age, and style for sale and that recently sold in a certain neighborhood. Preparing a CRA consists of three steps: ( [See Video on this](#) )

1. Fill in all **highlighted amenities** (in yellow) in order to complete a CRA accurately.
2. **Set criteria:** define the criteria for choosing comparable homes. Once you have created the NPO and filled in the amenities they will transfer over once you click. Once you click on "New CRA".
3. **Build your list of comparables:** search MLS or internal leasing database for comparable homes that recently rented. Enter the mapgrid for your subject property and search. If you have inventory then you can pull comps for within. If you don't have any that area select external listing and then you can fill in the fields with data from the MLS.
4. **Make Proper Adjustments**

## Generate a New CRA from the NPO Form

**Prospective Owner Detail**

BACK PREV ITEM NEXT ITEM TRAINING CMD CTR ADD PPTY TO OPS CBA'S MGT AG **NEW CRA** NEW PROSP OWNER SCRIPT

NPO Information saved!

**Prospective Owner Information**

Search Last Name Existing Owner

First Name Last Name Email Address Drivers License SSN Cell Phone Home Phone Work Phone

Mailing Street Num Street Name Unit City State Zip

Next Call Appt Date Appt Time Appt Status Status User

**Subject Property**

Street Number Street Name Unit City State Zip County Mapgrid

**Motivation And Referral Information**

Motivation Rent Desired Rent Q1 High Rent Q1 Low

Referral Type Referral Source Referral Info Referral Fee

**Email Management**

E1  E2A  E2B  E3  Management Agreement  General Email  Notify New Accounts

**Notes**

01/27/16 08:26:Ron -> Sent owner CRA and RR

**Listing Details**

Hot Buttons / Advertising Leasing Disclosures (1500 chars max)

Maintenance (1500 chars max) Accounting (1500 chars max)

**Upload Files**

Select File Property Photos NPO Documents

No file selected.

2038\_ARL.PDF

CRA8401262016101936.pdf

**Rating Survey**

Condition of Neighborhood 0  Notes

Overall First Impression - emotionality 0

Front Landscaping 0

Overall Front Exterior / Driveway / Garage Door 0

Condition of Appliances / Cabinets / Blinds / Screens 0

Condition of Flooring 0

Condition of Paint 0

Interior Condition / Cleanliness 0

Rear Landscaping / Patio 0

Overall Rear Exterior 0

Rating 0%

**Property Amenities And Utilities**

CODE	VALUE	DESCRIPTION	WEB
Age of Property	1950		<input type="checkbox"/>
Square Footage	770		<input type="checkbox"/>
# of Stories	1		<input type="checkbox"/>
Bedrooms	2		<input type="checkbox"/>
Bathrooms	2		<input type="checkbox"/>
Flooring			<input type="checkbox"/>
Carpet			<input type="checkbox"/>
Car Garage	1		<input type="checkbox"/>
Patio Slab	Y		<input type="checkbox"/>
Patio Covered	N		<input type="checkbox"/>
Central Air/Heat	Y		<input type="checkbox"/>
Dishwasher			<input type="checkbox"/>
Range			<input type="checkbox"/>
Microwave			<input type="checkbox"/>
Garbage Disposal			<input type="checkbox"/>
Fireplace			<input type="checkbox"/>
View	N		<input type="checkbox"/>
Lawns in	F		<input type="checkbox"/>
Family Room			<input type="checkbox"/>
RV/Boat Parking	N		<input type="checkbox"/>
Pool	C		<input type="checkbox"/>
Spa	C		<input type="checkbox"/>
Refrigerator			<input type="checkbox"/>
HOA			<input type="checkbox"/>
Deck			<input type="checkbox"/>
# of Garage Remotes			<input type="checkbox"/>
Maximum Occupancy			<input type="checkbox"/>
Perm Front Lawn			<input type="checkbox"/>
Perm Front/Rear Lawn			<input type="checkbox"/>
Temp Front Lawn			<input type="checkbox"/>
Temp Front/Rear			<input type="checkbox"/>
Wash/Dryer Included			<input type="checkbox"/>
Washer/Dryer Hook Up			<input type="checkbox"/>
Alarm			<input type="checkbox"/>
Electric			<input type="checkbox"/>
Water			<input type="checkbox"/>
Gas			<input type="checkbox"/>
Pets Allowed			<input type="checkbox"/>
Cross Street			<input type="checkbox"/>
Lawn Service	Y		<input type="checkbox"/>
Lease Term			<input type="checkbox"/>
Citycode			<input type="checkbox"/>
Rental Code			<input type="checkbox"/>
Pool Service	Y		<input type="checkbox"/>
Mailbox #			<input type="checkbox"/>
Gate Code			<input type="checkbox"/>

From the New Prospective Owner (NPO) Screen:

1. Fill in all **Highlighted Fields** under the **Property Amenities and Utilities** Column
2. Then, Click **SAVE**
3. Then Select **New CRA** from the Horizontal Navigation Bar at the top of the screen.

# Set Criteria

**m1 Solutions™**

- Log Out (CA2)
- Command Center
- Tablet Menu
- Help & Training
- CAZ Website
- Web Property Search
- M1 Client Portal
- M1 Updates
- Doc Drop Search
- Print Cart
- BETA - Late Fees
- ACCT Payable
- ACCT Receivable
- Email
- Leasing
- Letters
- Maintenance
- Marketing
- Owner
  - Add Owner
  - Add Prosp. Owner
  - Add Rental Analysis
  - Add Secondary Owner
  - Owners
  - Prosp. Owner
  - Rental Analysis
  - Secondary Owners
- Property
- Reconcile
- Reports
- Resident
- Setup

## Comparable Rental Analysis (CRA)

[BACK](#) [TRAINING](#) [CMD CTR](#) [AGENT BROCHURE](#) [EXTERNAL COMP \(RENT RANGE\)](#) [GOOD FAITH ESTIMATE](#) [OWNER BROCHURE](#) [VIEW NPO](#)

**Search For Comparable Properties**

SQFT From:  SQFT To:  Beds:  Baths:  Street Name:  City:  Zip:

Date Rented From:  Date Rented To:  Mapgrid:  Property Type:   Include Inactive

**Property Comparison**

Comparable Properties

Select from your search results here...

EXTERNAL LISTING:

Email Owner CRA  Email Agent CRA  Include Agent Brochure in Email  Copy CRA To NPO File Cabinet

Subject Property	Comparable Property 1	Comparable Property 2	Comparable Property 3																										
Property Information: <input type="button" value="Add From List"/> (or enter below)	<input type="button" value="Add From List"/>	<input type="button" value="Add From List"/>	<input type="button" value="Add From List"/>																										
Name: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>																										
Street Address: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>																										
City, State & Zip: <input type="text" value="Riverside CA 92503"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>																										
Mapgrid: <input type="text"/> <input type="button" value="Save"/> <input type="button" value="Google Map"/>	<input type="text"/> <input type="button" value="Save"/> <input type="button" value="Google Map"/>	<input type="text"/> <input type="button" value="Save"/> <input type="button" value="Google Map"/>	<input type="text"/> <input type="button" value="Save"/> <input type="button" value="Google Map"/>																										
Choose Property Picture: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>																										
...OR Upload Property Picture: <input type="button" value="Browse..."/> No file <input type="button" value="Upload"/>	<input type="button" value="Browse..."/> No file <input type="button" value="Upload"/>	<input type="button" value="Browse..."/> No file <input type="button" value="Upload"/>	<input type="button" value="Browse..."/> No file <input type="button" value="Upload"/>																										
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## Select Comparables from Internal Resources

**Comparable Rental Analysis (CRA)**

BACK TRAINING CMD CTR AGENT BROCHURE EXTERNAL COMP (RENT RANGE) GOOD FAITH ESTIMATE OWNER BROCHURE VIEW NPO

**Search For Comparable Properties**

SQFT From: 500 SQFT To: 1000 Beds: 2+ Baths: 1+ Street Name: City: Zip: Date Rented From: 08/01/2015 Date Rented To: 02/01/2016 Mapgrid: Property Type: SFH  Include Inactive Search

**Property Comparison**

Comparable Properties

Select from your search results here...  1

Select from your search results here...  2

EXTERNAL LISTING Riverside SF:891 BD:2 BTH:1 RNTD:11/11/2015 LI: MGRD:715B2 \$1350.00 Address information, upload a picture and press SAVE.

Email Owner CRA  Email Agent CRA  Include Agent Brochure in Email  Copy CRA To NPO File Cabinet

Property Information	Comparable Property 1	Comparable Property 2	Comparable Property 3
Name	<input type="button" value="Add From List"/> 3	<input type="button" value="Add From List"/>	<input type="button" value="Add From List"/>
Street Address			
City, State & Zip	Riverside CA 92503		
Mapgrid	<input type="button" value="Save"/> 5 <input type="button" value="Google Map"/>	<input type="button" value="Save"/> <input type="button" value="Google Map"/>	<input type="button" value="Save"/> <input type="button" value="Google Map"/>
Choose Property Picture	<input type="button" value="v"/> 4		
OR Upload Property Picture	<input type="button" value="Browse..."/> No file <input type="button" value="Upload"/>	<input type="button" value="Browse..."/> No file <input type="button" value="Upload"/>	<input type="button" value="Browse..."/> No file <input type="button" value="Upload"/>
Rents			

DESCRIPTION	VALUE
Age of Property	1950
Square Footage	770
Bedrooms	2
Bathrooms	2
Carpet	
Flooring	
Car Garage	1
Patio Covered	N
Patio Slab	Y
Central Air/Heat	Y
Lawns in	F
View	N

From the Comparable Rental Analysis (CRA) Screen:

After clicking **Search** based on the filled in criteria...

1. Open the drop down list of **Comparable Properties**
2. Select a **Property** from the list that generated
3. Click **Add From List** for the Column you would like to add the Comparable data to.
4. You can then select a **Photo** for the property from the drop down list
5. Then, click **SAVE**



## Select Comparables from External Resources

**Comparable Rental Analysis (CRA)**

BACK TRAINING CMD CTR AGENT BROCHURE EXTERNAL COMP (RENT RANGE) GOOD FAITH ESTIMATE OWNER BROCHURE VIEW NPO

**Search For Comparable Properties**

SQFT From: 500 SQFT To: 1000 Beds: 2+ Baths: 1+ Street Name: City: Zip: Date Rented From: 08/01/2015 Date Rented To: 02/01/2016 Mapgrid: Property Type: SFH Include Inactive:  Search

**Property Comparison**

Comparable Properties

Select from your search results here...  1

Select from your search results here... 2

EXTERNAL LISTING Riverside SF 891 BD 2 BTH 1 RHTD 11/11/2015 LI... MGRD: F1DBZ \$1350.00 address information, upload a picture and press SAVE.

Email Owner CRA  Email Agent CRA  Include Agent Brochure in Email  Copy CRA To NPO File Cabinet

Property Information	Comparable Property 1	Comparable Property 2	Comparable Property 3
Name	<input type="button" value="Add From List"/> 3	<input type="button" value="Add From List"/>	<input type="button" value="Add From List"/>
Street Address			
City, State & Zip	Riverside CA 92503		
Mapgrid	<input type="button" value="Save"/> <input type="button" value="Google Map"/> 6	<input type="button" value="Save"/> <input type="button" value="Google Map"/>	<input type="button" value="Save"/> <input type="button" value="Google Map"/>
Choose Property Picture	<input type="button" value="Browse..."/> 4 <input type="button" value="Upload"/> 5	<input type="button" value="Browse..."/> No file <input type="button" value="Upload"/>	<input type="button" value="Browse..."/> No file <input type="button" value="Upload"/>
Rent\$			

DESCRIPTION	VALUE
Age of Property	1950
Square Footage	770
Bedrooms	2
Bathrooms	2
Carpet	
Flooring	
Car Garage	1
Patio Covered	N
Patio Slab	Y
Central Air/Heat	Y
Lawns in	F
View	N

From the Comparable Rental Analysis (CRA) Screen:

*After Searching the MLS or other External Sources based on similar criteria for the Subject Property...*

1. Open the drop down list of **Comparable Properties**
2. Select a **Property** from the list that generated
3. Click **Add From List** for the Column you would like to add the Comparable data to.
4. You can then select **Browse** to select a photo you saved for the property from external sources
5. Then, click **UPLOAD**
6. Then, click **SAVE**



# Make Adjustments

**Comparable Rental Analysis (CRA)**

BACK TRAINING CMD CTR AGENT BROCHURE EXTERNAL COMP (RENT RANGE) GOOD FAITH ESTIMATE OWNER BROCHURE VIEW IPO

Search For Comparable Properties

SQFT From SQFT To Beds Baths Street Name City Zip

Date Rented From Date Rented To Mapgrid Property Type

SPH  Include Inactive **Search**

**Property Comparison**

Comparable Properties

Enter criteria above and press SEARCH...

Select a Subject Property from the list above and press ADD or if the property is a non-company property, enter the name and address and press SAVE

If the property is a non-company property, choose EXTERNAL LISTING from above list and press ADD FROM LIST. Then enter the address information, upload a picture and press SAVE.

**Print Preview**  Email Owner CRA  Email Agent CRA  Include Agent Brochure In Email  Copy CRA To NPO File Cabinet

Subject Property	Comparable Property 1	Comparable Property 2	Comparable Property 3					
<b>Property Information</b>	<b>Add From List</b> (or enter below)	<b>Add From List</b>	<b>Add From List</b>					
Name								
Street Address								
City, State & Zip	Riverside CA 92503	Riverside CA 92501	Riverside CA 92503					
Mapgrid	714E2 <b>Save</b> <b>Google Map</b>	88503 <b>Save</b> <b>Google Map</b>	714J5 <b>Save</b> <b>Google Map</b>					
Choose Property Picture	AFRONT-10WEB.jpg <b>Upload</b>	AFront.jpg <b>Upload</b>	Front.jpg <b>Upload</b>					
RENTS	1195.00	1200.00	1425.00					
DESCRIPTION	VALUE	ADJ.	DESCRIPTION	VALUE	ADJ.	DESCRIPTION	VALUE	ADJ.
Age of Property	1950	0.00	Age of Property	1924	0.00	Age of Property	1963	0.00
Square Footage	770	0.00	Square Footage	900	-25.00	Square Footage	850	-36.00
Bedrooms	2	0.00	Bedrooms	2	0.00	Bedrooms	3	-30.00
Bathrooms	2	0.00	Bathrooms	2	0.00	Bathrooms	2	0.00
Carpet	Y	0.00	Carpet	Y	0.00	Carpet	Y	0.00
Flooring		0.00	Flooring		0.00	Flooring		0.00
Car Garage	1	0.00	Car Garage	1	0.00	Car Garage	2	-25.00
Patio Covered	N	0.00	Patio Covered	N	0.00	Patio Covered	N	0.00
Patio Slab	Y	0.00	Patio Slab	Y	0.00	Patio Slab	Y	0.00
Central Air/Heat	Y	0.00	Central Air/Heat	W	25.00	Central Air/Heat	Y	0.00
Lawns in	F	0.00	Lawns in	FB	0.00	Lawns in	F	0.00
View	N	0.00	View	N	0.00	View	NA	0.00
RV/Boat Parking		0.00	RV/Boat Parking		0.00	RV/Boat Parking		0.00
Pool	C	0.00	Pool	N	0.00	Pool	N	0.00
Spa	C	0.00	Spa	N	0.00	Spa	N	0.00
Lawn Service	Y	0.00	Lawn Service	Y	0.00	Lawn Service	N	40.00
Pool Service	N	0.00	Pool Service	N	0.00	Pool Service	N	0.00
Location		0.00	Location		0.00	Location		0.00
Market Adjustment	Condo	0.00	Market Adjustment		-100.00	Market Adjustment		-100.00
PPTY Condition		0.00	PPTY Condition		0.00	PPTY Condition		0.00
<b>Adjusted Rents</b>	<b>1195.00</b>		<b>1124.00</b>			<b>1274.00</b>		

Days to Rent 30 Avg. Rent Rate 1197.07 Start Rent Rate 1297.07 Lowest Rent Rate 1097.07 **Calculate** **Save**

**CRA Footer Description**

Please note these figures are based on the following conditions:  
 CONDITION OF PROPERTY:  
 \* Inside to be painted if needed  
 \* Front door and Garage door to be painted  
 \* Front and Rear lawn to be in and green

**Good Faith Estimate**

Rent Range High Rent Low Rent

0 0

1st Month Rent % Mgt.Fee Mgt.Fee Flat % Rent Up Rent Up Flat

0 0 0 0 0 0

Initial Start up Adv.Fee Maint. Misc. Misc.

0 0 0 0

2nd Mo. and After Fri. Lawn Fri/Rear Lawn Pool Other Other Other % Tax Sav.

0 0 0 0 0 0 0 0

**Save**  Email Owner  Copy Good Faith To NPO File Cabinet **Print Preview**

Adjustments are pre-calculated based on Amounts allocated in Set UP [Click Here](#)

Calculations are conducted to in order to equalize the factors of the Comparable Property to the factors of the Subject Property, based on amenities provided and thus determining the Subject Property Value.

ex. If the Subject Property has a Pool, but the Comparable Property does not, then a value of \$75 is added to the rent value of the Comparable to bring it up to the same standard of the Subject.


ex. If the Subject Property does not have a Covered Patio, but the Comparable Property does, then a value of \$20 is deducted from the rent value of the Comparable to bring it down to the same standard of the Subject.

1. Adjustments can be modified for **Comparable Property 1**
2. Adjustments can be modified for **Comparable Property 2**
3. Adjustments can be modified for **Comparable Property 3**
4. Click **CALCULATE**, to allow any manual adjustments to the report to take effect.
5. Then, click **SAVE**

**Note:**

\* Market Adjustment can be used to adjust each Comparable individually, based on any number of Factors that relate to the Market (Condition, Neighborhood, Demographics, Seasonal Factors, Days on the Market, etc.)




# Report - Comparable Rental Analysis (CRA)



**Management One Corona**  
Corona, CA 92879  
Phone:                      Fax:

**Comparable Rental Analysis**

Prepared For:                      Prepared On: 2/8/2016  
Prepared By:                      Phone:                      Email:

Subject Property	Comparable 1	Comparable 2	Comparable 3																																																																																																																																																																																																																																							
Riverside CA 92503	Riverside CA 92503 <b>Rent: \$1,195.00</b>	Riverside CA 92501 <b>Rent: \$1,200.00</b>	Riverside CA 92503 <b>Rent: \$1,425.00</b>																																																																																																																																																																																																																																							
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Please note these figures are based on the following conditions:

**CONDITION OF PROPERTY:**

- \* Inside to be painted if needed
- \* Front door and Garage door to be painted
- \* Front and Rear lawn to be in and green
- \* Blinds or window coverings on all windows
- \* All items to be functional such as appliances, stove, Etc
- \* Property to be professionally cleaned including windows appliances mirrors & carpets must be free of stains

**QUALIFICATIONS AND TERMS OF LEASE:**

- \* Tenant must sign a One Year Lease
- \* Tenant is required to pay a Security Deposit of 120% of the first months rent up front before move in
- \* Tenant income must be 3 times the rental rate

Monday, February 8, 2016
www.managementone.com
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## Report Navigation:

1. Subject Property Address & Amenities
2. Comparable Property 1 Address & Amenities
3. Comparable Property 2 Address & Amenities
4. Comparable Property 3 Address & Amenities
5. Agreed Upon Rent Range (Start Rent, Low Rent & Average)

6. Estimated Average Days to be on the Market
7. Photos of Comparable Properties
8. Conditions to Support Report Estimated Conclusions (Property Conditions & Resident Qualification / Lease Term)

Header & Footer Information:

- a. Company Logo
- b. Office Name and Contact information
- c. Report Name
- d. Parties of Report (Prepared For; Prepared By)
- e. Date the Report was Run / Printed
- f. Page Number of Report

## 2 Minute Elevator talk

This is to get Agents leads in person or over the phone to get a sit down 20 min PPT Pres

You can use this at Board meetings or any Real Estate function or cold call Agents.

Your speech is this;

- Been in business X years
- We're using a property management system that has rented, rehabbed, and management over 10,000 Single Family Homes in 30 years
- We have the experience and knowledge that supersedes other management companies
- We have a fabulous program for you the agent/broker
- Here is what we do for Agents; - Hand them brochure, or e-mail this from the New Prospective Owner (NPO) Screen.

1. Owner Referral of X
2. Resident Referral of X
3. Protection of the property you're referring us
4. Protection of your client
5. Guarantee you a commission if our resident buys the property
6. Free Comparable rental analysis so you give the right rental rate to your owner Internet and MLS rates are 14% higher than what they actually rent for , so on a \$2000 rent you're about \$300 off each month
7. We have a SFHRS ( Single Family Home Retirement Strategy) Program that Agents can utilize to make commissions
8. We have a Investment Software that you can run out a professional analysis on a property and a complete package to send to you investor client within 5 min to create commissions for you
9. We are a full service management company that market, leases, does all maintenance repairs so as an agent you don't have to any of these items anymore.

Close for the appt or business card

When is a good time in your office for me to meet with you as well as some of your other associates for 20 min to go over in detail the things I have discussed here Tuesday or Thursday, morning or afternoon.

If they don't have time for a face to face you can do a 20 min gotomeeting on the internet.



## 5 Minute Stadium Speech

This is a **5 minute stadium speech** that can be used if you're on a panel in front of a few hundred people or even one on one. This really tells someone the difference between self-management and professional property management in less than 5 minutes.

Use YES/NO to engage the audience

Thank you my name is "*Your Name*" the "*Your Title*" of "*Your Company*"

I'm a Real Estate Broker and I own several pieces of Real Estate a number of states

**Self-Management (vs) a Professional Property Management Company is an hour topic but I'll keep it to just a few key points today**

### **Self-Management**

- **The biggest reason to use a professional management company is knowledge and Experience.** Most property management companies have management hundreds of homes and properties at "*Your Company*" we have **Leased, Rehabbed, and managed over 10,000 houses.**
- Second you can only purchase and manage about **1-2 properties before it becomes a full time job** and starts taking away your family and personal time
- In self-management owners/investors never raise rents in fear of losing a resident this can **cost you \$9000 over 5 years**
- Managing the property yourself you are **emotionally attached therefore your vision will be blurred as mine would be**
- In Self- management owners/ investors use **unlicensed and uninsured repairman** to cut their repair cost.

**As a professional property manager there are 7 aspects we manage in the management of property**

- **The Property**
- **The Resident we don't call them tenants**
- **The Liability and Protection for the owner**
- **The Cash flow**
- **The Owner**
- **Maintenance and the Vendors**
- **Manage the Legalities**

**PROPERTY:** Let me first address The Property

1. **WE know where to put the money in the right places in rehab** to create a good product to rent. We have seen owners/ investors put \$15,000 on the inside of the property and the front

yard has no landscaping. **In rehabbing 10,000 properties** we have the knowledge on where you should put the money or not. Prospect Residents rent on EMOTION not LOGIC

**Look, Feel, Touch, Smell; How many of you would agree with that**

1. Prof Mgmt Companies know what the real rental rate not the sticker prices which is what's on Zillow or MLS or other internet sites which are **normally 14-20% higher than what the property will really rent for**
2. **Professional Management companies have a pipeline of residents standing by** where in self-management you have to spent time to get ramped up that cost you money sometimes **\$50-\$100 a day in loss of rent.**
3. **Prof Mgt companies look at more than just top rent, we look at**
4. **Qualifications, not a just fica Score-** To much month at the end of the money
5. **Terms mo/mo or 1 yr**
6. **Amount of Security Deposit**
7. **Prior resident history not current**

**Resident:**

1. **Giving the new resident Clarity** about the do and don'ts so we don't oversell them, most owners who self-manage oversell because all they see is another mortgage payment coming due
2. **Number one reason why residents leave is maintenance and customer service not the increase in rents,** our contractors must respond to the resident within 4 hours of the repair request being made during normal bus hours. Residents will pay for value just like you do some of you today drove here in Mercedes, BMW's, etc. but could have come here in a Volkswagen but you will pay for value so will your residents if they are given professionally timely service.
3. **Professional Property Managers keep residents accountable** by driving by the property with our Management One Vans because even the good people will drift, just like all of us will drift in speeding if the cops we're on FWY. YES/NO



4. How we created residents that have been with us 17,18 and more than 20 years, and some when the owners sold the property rented another property from us. Would you like to know the answer to that? Well it's not never raising the rent, get that stinking thinking out of our heads, it simply treating them as a resident and giving great customer service, not as a tenant. George Cerruto Story and Calle Sauslitto.

### **Protection and Liability**

1. **You're biggest fear is what if a resident destroys your property right?** If you have the correct property insurance you can eliminate that fear. It's called Malicious intent insurance
2. **We use insured licensed repairman to reduce your exposure** if someone got hurt or damages the property so you're insurance doesn't have to be used
3. **Asset protection. As your portfolio builds** you want to protect it through asset management which we can assist you with.

**Cash Flow:** So what is managing your cash flow and Why!

1. **Professional Property Managers manage your cost of maintenance we have** a fixed maintenance price list that we set up over 25 years ago and it's update every year, In short we tell the contractors what we will pay them so as an owner you don't overpay for items
2. **We make sure that when the market supports rent increases we raise them.** Our experience with 10,000 residents we know how to approach them and explain to them why the rent is increasing. A \$50 increase a year can give you the owner \$12000 over 6 years.
3. **Will the carpet,** appliance, etc eventually wear out Yes/ NO

### **Landlord/Investor:**

1. **We make sure you have the right property insurance** at the right price to improve your cash flow and make sure you have protection
2. We make **sure you have your properties at the lowest interest rate** possible at all times on your loans
3. We make sure you get PMI and MMI removed from your loan once you have about 28% Equity in it

4. If you need to **exchange a property for another** for a higher appreciation area we can assist you with the knowledge of how to do this
5. **We assist you in building a single family home retirement plan** to accumulate many different properties, How many of you would like to do that

### **Paying Management Fees**

1. **Management Fees nationwide are 7-10% and to rent up your property the fee is from \$200 to one month's full rent.** But you pay a management fee no matter what it just depends on what label you want to put on it. For Example **every day you property is vacant you're management fee is 100% YES or NO....** and on another note if it takes you a month longer to rent the property on your own you've just paid a management fee for the entire year but you still have to do the work. Let me Explain
2. **Lastly IRS Will pay you half of your management fee** since management fees are a tax write. 37% Fed/13% state is 50% YES/NO
3. Your management fee to have all the things I just went over is less than what you pay your gardener to mow your lawn or your cable bill since if you're gross management fee is \$150 a month It's really only \$75 a month with IRS paying half or \$2.50 a day less than a cup of coffee a day at Starbucks is that reasonable yes or no

Thank you

## **Assessments**

### **DiSC Behavioral Assessment**

DiSC is a behavior analyzing tool that helps people communicate with each other by using the communication style that's dominant to them. DiSC does not measure values and intellect, nor is it about personality. What DiSC does is to measure how individuals will react to scenarios or situations where they are subjected to higher stress levels. This report analyzes behavioral style; that is, a person's manner of doing things. Is the report 100% true? Yes, no and maybe. We are only measuring behavior. We only report statements from areas of behavior in which tendencies are shown. To improve accuracy, feel

free to make notes or edit the report regarding any statement from the report that may.

Examples of these situations may include a sales call or pitch and other situations where individuals may feel frustrated or agitated. When this happens, the dominant behavior style will be exhibited by the person as well as the dominant communication style that is associated with this.

When the behavior and communication styles used to a particular person do not match correctly, it may lead to ineffective communication and confusion. This is where DiSC proves to be very helpful. It can be a powerful tool that managers, leaders, coaches and business owners alike can use to better understand and communicate with their colleagues, superiors and subordinates.

### DiSC Model of Behavior



## DiSC Defined

### What do the letters mean?



#### **Dominance**

*Emphasis on shaping the environment by overcoming opposition to accomplish results*

#### **Priorities**

Getting immediate results  
Taking action  
Challenging self and others

[Learn More](#)



#### **Influence**

*Emphasis on shaping the environment by influencing or persuading others*

#### **Motivated by**

Social recognition  
Disapproval  
Loss of influence  
Being ignored

[Learn More](#)



#### **Steadiness**

*Emphasis on cooperating with others within existing circumstances to carry out the task*

#### **You will notice**

Patience  
Team person  
Calm approach  
Good listener  
Humility

[Learn More](#)



#### **Conscientiousness**

*Emphasis on working conscientiously within existing circumstances to ensure quality and accuracy*

#### **Fears**

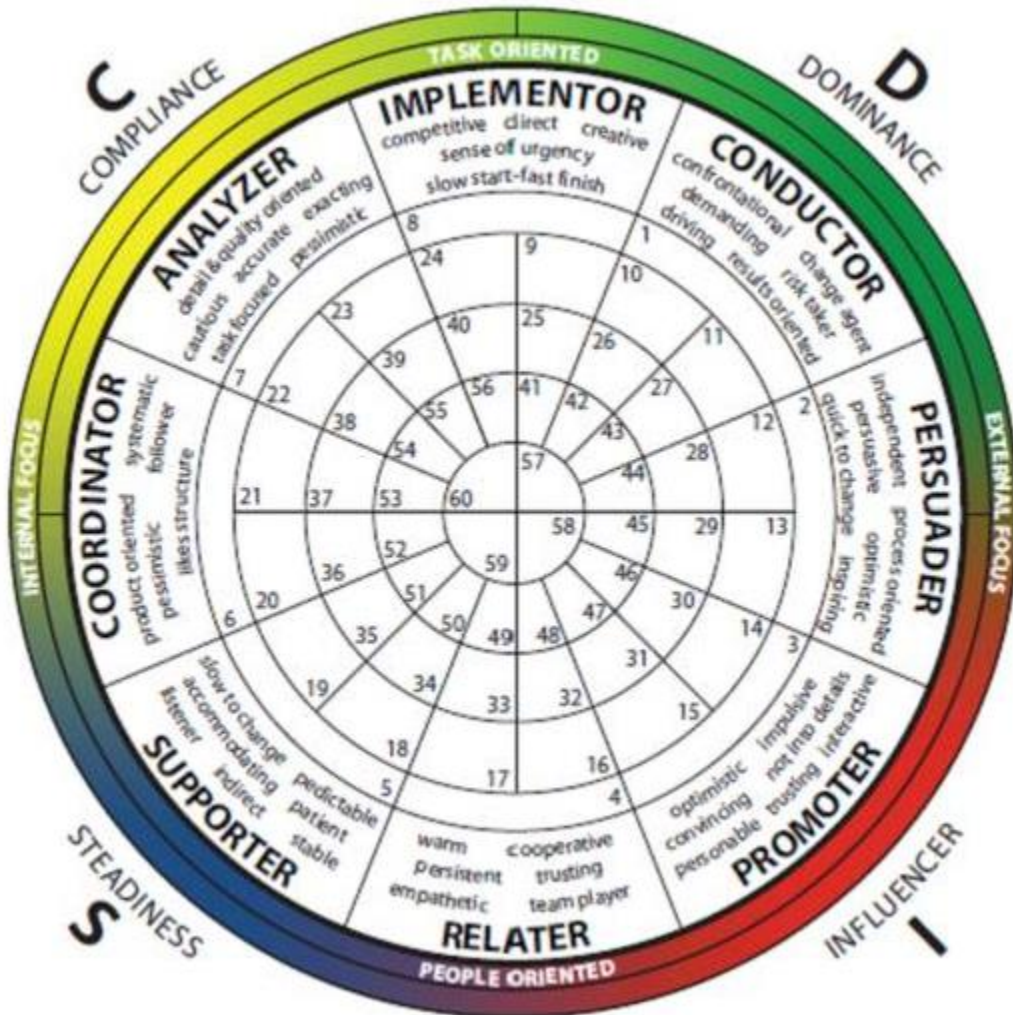
Social criticism  
Slipshod methods  
Being wrong

[Learn More](#)

## DiSC Traits

STYLE	<b>D</b> HIGH DOMINANCE	<b>I</b> HIGH INFLUENCE	<b>S</b> HIGH STEADINESS	<b>C</b> HIGH CONSCIENTIOUS
<b>PACE</b>	<i>Fast/Decisive</i>	<i>Fast/Spontaneous</i>	<i>Slower/Relaxed</i>	<i>Slower/Systematic</i>
<b>PRIORITY</b>	<i>Goal</i>	<i>People</i>	<i>Relationship</i>	<i>Task</i>
<b>MOTIVATED BY</b>	<i>Results Control</i>	<i>Participation Praise and encouragement</i>	<i>Acceptance Security</i>	<i>Accuracy Precision</i>
<b>STRENGTHS</b>	<i>Challenges Leadership Setting and driving high standards</i>	<i>Persuading Motivating Entertaining High energy</i>	<i>Listening Teamwork Follow-through Supporting others</i>	<i>Following the rules Logistics Planning, creating systems and structures</i>
<b>GROWTH AREAS</b>	<i>Impatient Insensitive to others Poor listener</i>	<i>Inattentive to detail Short attention span Low follow-through</i>	<i>Oversensitive Slow to begin Lacks global perspective</i>	<i>Perfectionists Critical Unresponsive</i>
<b>FEARS</b>	<i>Not having control Having to completely trust others</i>	<i>Loss of social recognition</i>	<i>Sudden changes Instability</i>	<i>Personal criticism of their performance or technique</i>
<b>IRRITATIONS</b>	<i>Inefficiency Indecision</i>	<i>Routines Complexity</i>	<i>Insensitivity Impatience</i>	<i>Disorganization Informality</i>
<b>UNDER STRESS MAY BECOME</b>	<i>Dictatorial Critical</i>	<i>Sarcastic Superficial</i>	<i>Passive Indecisive</i>	<i>Withdrawn Stubborn</i>
<b>GAINS SECURITY THROUGH</b>	<i>Control Leadership</i>	<i>Recognition Others' approval</i>	<i>Friendship Cooperation</i>	<i>Preparation Thoroughness</i>
<b>MEASURES PERSONAL WORTH BY</b>	<i>Impact or results Track record and progress</i>	<i>Acknowledgments Applause Compliments</i>	<i>Depth of contribution Compatibility with others</i>	<i>Precision Accuracy Quality of results</i>
<b>IDEAL SPORTING ENVIRONMENT</b>	<i>Efficient Busy, fast paced Structured</i>	<i>Interacting Busy, big picture Personal</i>	<i>Friendly Functional Personal</i>	<i>Formal procedures Detailed Structured</i>

## DiSC Assessment Model



## DiSC Testing

**Behavioral research suggests that the most effective people are those who understand themselves, both their strengths and weaknesses, so they can develop strategies to meet the demands of their environment.**


A person's behavior is a necessary and integral part of who they are. In other words, much of our behavior comes from "nature" (inherent), and much comes from "nurture" (our upbringing). It is the universal language of "how we act," or our observable human behavior.

**In this report we are measuring four dimensions of normal behavior. They are:**

- How you respond to problems and challenges.
- How you influence others to your point of view.
- How you respond to the pace of the environment.
- How you respond to rules and procedures set by others.

This report analyzes behavioral style; that is, a person's manner of doing things. Is the report 100% true? Yes, no and maybe. We are only measuring behavior. We only report statements from areas of behavior in which tendencies are shown. To improve accuracy, feel free to make notes or edit the report regarding any statement from the report that may or may not apply, but only after checking with friends or colleagues to see if they agree.






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THE  
**ABELSON**  
GROUP

### Areas of Discussion

The report will review the individual's character by way of their assessed

General Characteristics

Value to the Organization



Checklist for Communicating

Communication Tips

Ideal Environment

Perceptions

Self-Perception

Other's Perception Moderate

Other's Perception Extreme

Descriptors

Dominance

Influencing

Steadiness

Compliance

Natural and Adapted Style

Problems

People

Pace

Procedures

Keys to Motivating

Keys to Managing

Area for Improvement

Action Plan

Behavioral Hierarchy

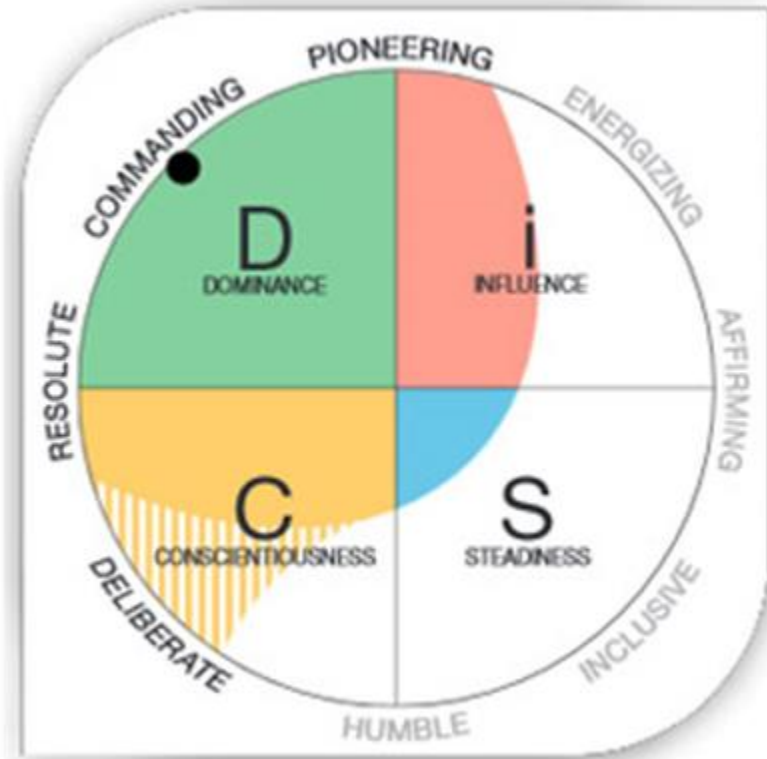
Following Policy

Consistency

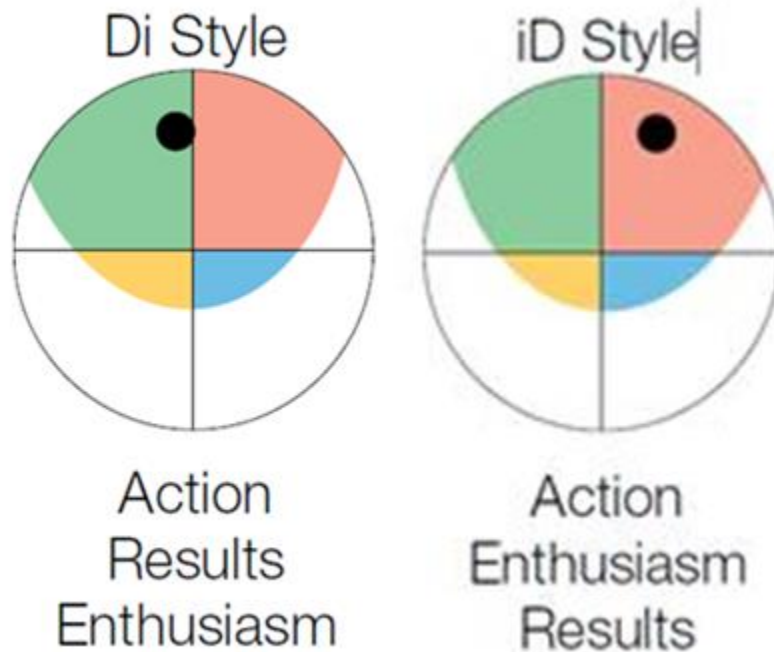
Follow Up and Follow Through  
Organized Workplace  
Analysis of Data  
Customer Relations  
People Oriented  
Frequent Interactions with Others  
Competitiveness  
Versatility  
Frequent Change  
Urgency  
Style Insights® Graph  
The Success Insights® Wheel

## DiSC for Office Manager

### DiSC Assessment & Behavioral Styles - Everything DiSC Work Leaders



## Ideal DiSC - Di Style or iD Style is ideal for this position



### Value to the Organization

Below you will find some talents and behaviors that are ideal for this position in the organization.

- Flexible.
- Creative problem solving.
- Accomplishes goals through people.
- Turns confrontation into positives.
- People-oriented.
- Builds confidence in others.
- Optimistic and enthusiastic.
- Team player.
- Adaptable.

## Word Descriptions

Demanding Egocentric Driving Ambitious Pioneering Strong-Willed Forceful Determined Aggressive Competitive Decisive Venturesome Inquisitive Responsible	Effusive Inspiring Magnetic Political Enthusiastic <b>Demonstrative</b> <b>Persuasive</b> <b>Warm</b> <b>Convincing</b> <b>Polished</b> <b>Poised</b> <b>Optimistic</b> Trusting Sociable	Phlegmatic Relaxed Resistant to Change Nondemonstrative Passive Patient Possessive Predictable Consistent <b>Deliberate</b> <b>Steady</b> <b>Stable</b>	Evasive Worrisome Careful Dependent Cautious Conventional Exacting Neat Systematic Diplomatic Accurate Tactful Open-Minded Balanced Judgment
<b>Dominance</b>	<b>Influencing</b>	<b>Steadiness</b>	<b>Compliance</b>
<b>Conservative</b> <b>Calculating</b> <b>Cooperative</b> <b>Hesitant</b> Low-Keyed Unsure Undemanding Cautious Mild Agreeable Modest Peaceful Unobtrusive	Reflective Factual Calculating Skeptical Logical Undemonstrative Suspicious Matter-of-Fact Incisive Pessimistic Moody Critical	Mobile Active Restless Alert Variety-Oriented Demonstrative Impatient Pressure-Oriented Eager Flexible Impulsive Impetuous Hypertense	<b>Firm</b> <b>Independent</b> <b>Self-Willed</b> Stubborn Obstinate Opinionated Unsystematic Self-Righteous Uninhibited Arbitrary Unbending Careless with Details

## Communication Tips

**When communicating with a person who is dependent, neat, conservative, perfectionist, careful and compliant:**

- Prepare your "case" in advance.
- Stick to business.
- Be accurate and realistic.

**Factors that will create tension or dissatisfaction:**

- Being giddy, casual, informal, loud.
- Pushing too hard or being unrealistic with deadlines.
- Being disorganized or messy.

**When communicating with a person who is ambitious, forceful, decisive, strong-willed, independent and goal-oriented:**

- Be clear, specific, brief and to the point.
- Stick to business.
- Be prepared with support material in a well-organized "package."

**Factors that will create tension or dissatisfaction:**

- Talking about things that are not relevant to the issue.
- Leaving loopholes or cloudy issues.
- Appearing disorganized.

**When communicating with a person who is patient, predictable, reliable, steady, relaxed and modest:**

- Begin with a personal comment--break the ice.
- Present your case softly, nonthreateningly.
- Ask "how?" questions to draw their opinions.

**Factors that will create tension or dissatisfaction:**

- Rushing headlong into business.
- Being domineering or demanding.
- Forcing them to respond quickly to your objectives.

**When communicating with a person who is magnetic, enthusiastic, friendly, demonstrative and political:**

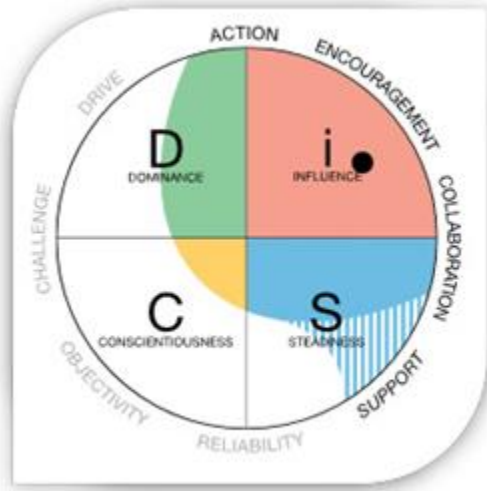
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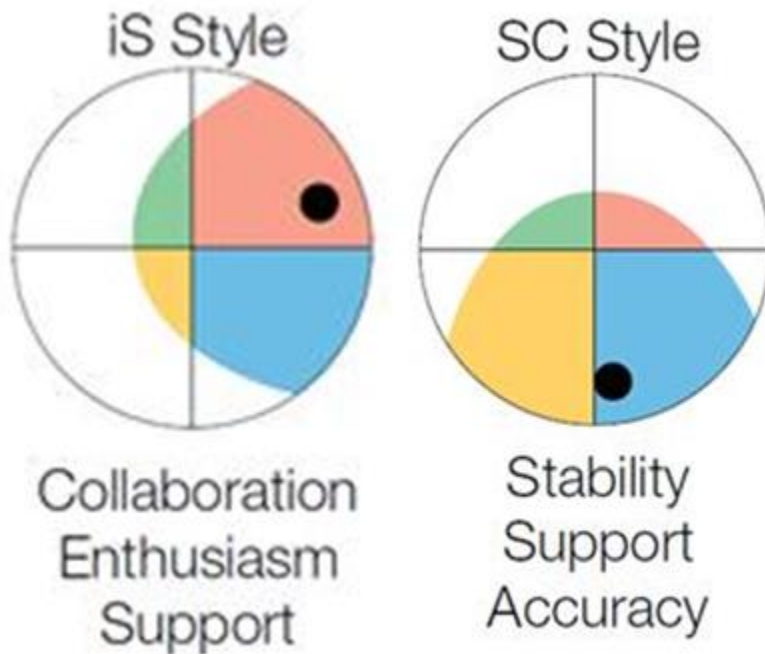
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- Controlling the conversation.
- Driving on facts and figures, alternatives, abstractions.

## DiSC for Property Manager

### DiSC Assessment & Behavioral Styles - Everything DiSC Management



**Ideal DiSC - iS Style or SC Style is ideal for this position**



### Value to the Organization

Below you will find some talents and behaviors that are ideal for this position in the organization.

- Flexible.
- Creative problem solving.
- Accomplishes goals through people.
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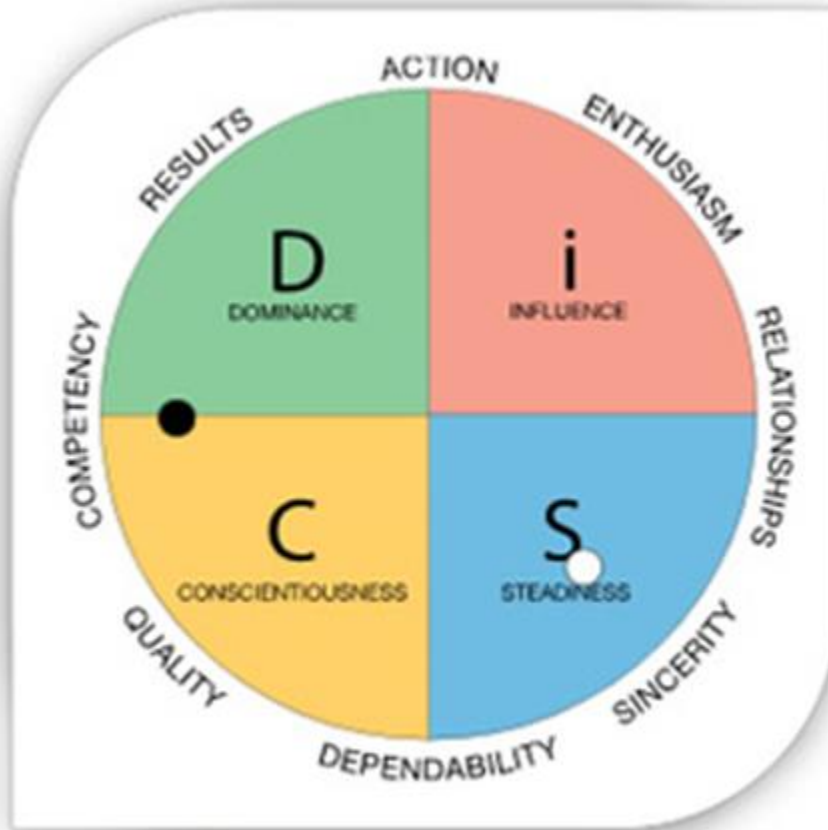
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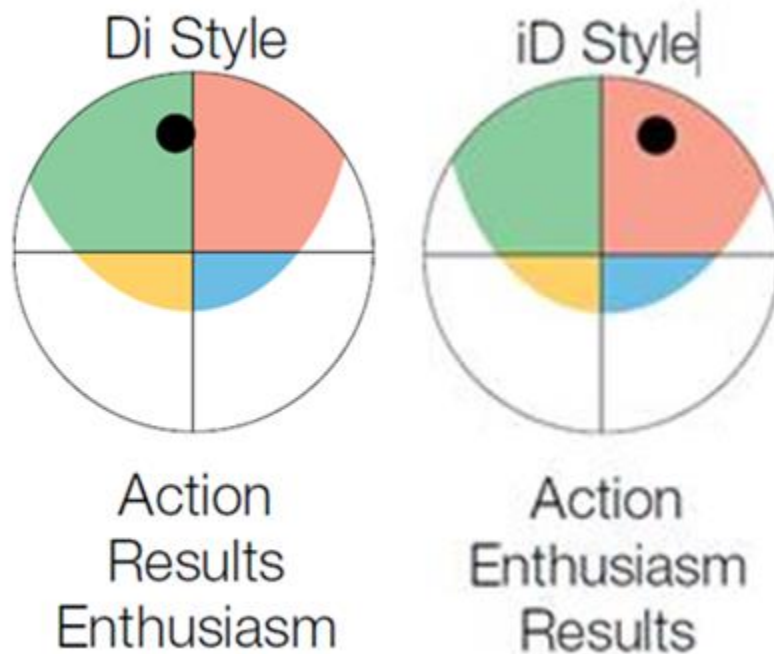
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## DiSC for New Accounts Rep.

### DiSC Assessment & Behavioral Styles - Everything DiSC Sales



## Ideal DiSC - Di Style or iD Style is ideal for this position



### Value to the Organization

Below you will find some talents and behaviors that are ideal for this position in the organization.

- Team player.
- Dedicated to her own ideas.
- Pioneering.
- Optimistic and enthusiastic.
- Negotiates conflicts.
- Motivates others towards goals.
- Builds confidence in others.
- Can support or oppose strongly.

## Word Descriptions

Driving	Inspiring	Relaxed	Cautious
Ambitious	Magnetic	Passive	Careful
Pioneering	Enthusiastic	Patient	Exacting
Strong-Willed	Persuasive	Possessive	Systematic
Determined	Convincing	Predictable	Accurate
Competitive	Poised	Consistent	Open-Minded
Decisive	Optimistic	Steady	Balanced Judgment
Venturesome	Trusting	Stable	Diplomatic
<b>Dominance</b>	<b>Influencing</b>	<b>Steadiness</b>	<b>Compliance</b>
Calculating	Reflective	Mobile	Firm
Cooperative	Factual	Active	Independent
Hesitant	Calculating	Restless	Self-Willed
Cautious	Skeptical	Impatient	Obstinate
Agreeable	Logical	Pressure-Oriented	Unsystematic
Modest	Suspicious	Eager	Uninhibited
Peaceful	Matter-of-Fact	Flexible	Arbitrary
Unobtrusive	Incisive	Impulsive	Unbending

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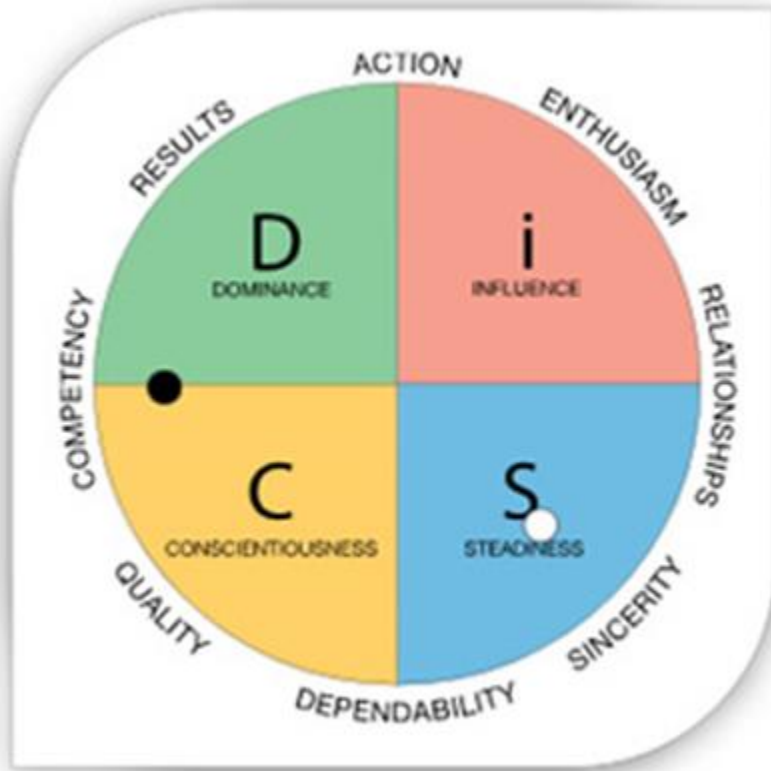
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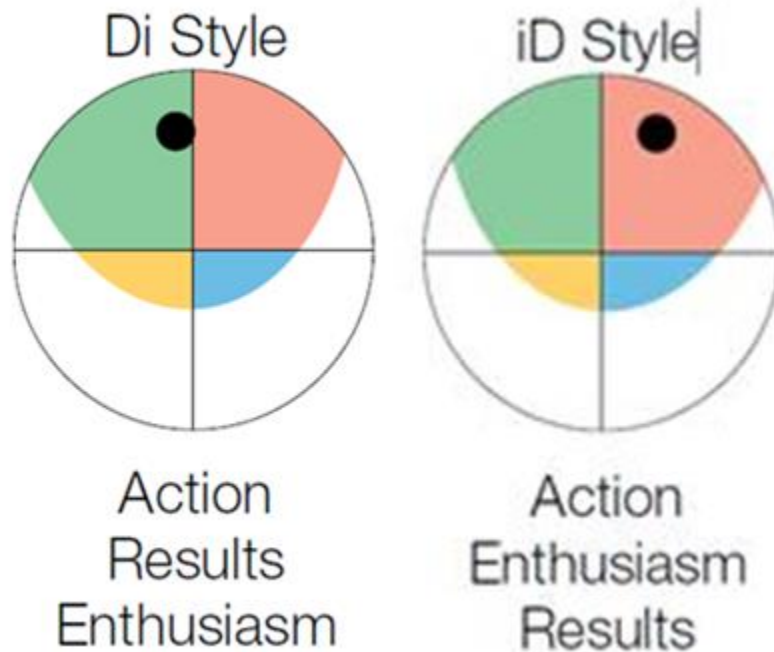
- Being curt, cold or tight-lipped.
- Controlling the conversation.
- Driving on facts and figures, alternatives, abstractions.

## DiSC for Leasing Consultant

### DiSC Assessment & Behavioral Styles - Everything DiSC Sales



## Ideal DiSC - Di Style or iD Style is ideal for this position



### Value to the Organization

Below you will find some talents and behaviors that are ideal for this position in the organization.

- Team player.
- Dedicated to her own ideas.
- Pioneering.
- Optimistic and enthusiastic.
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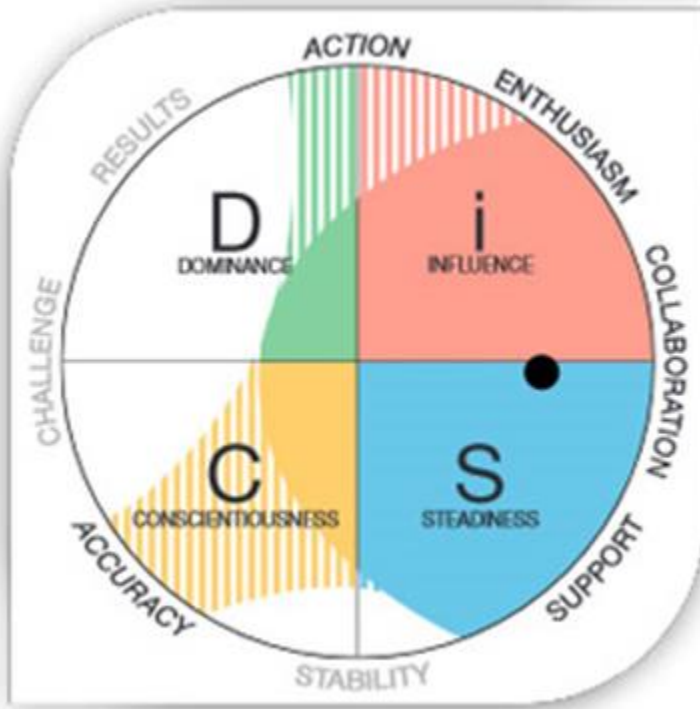
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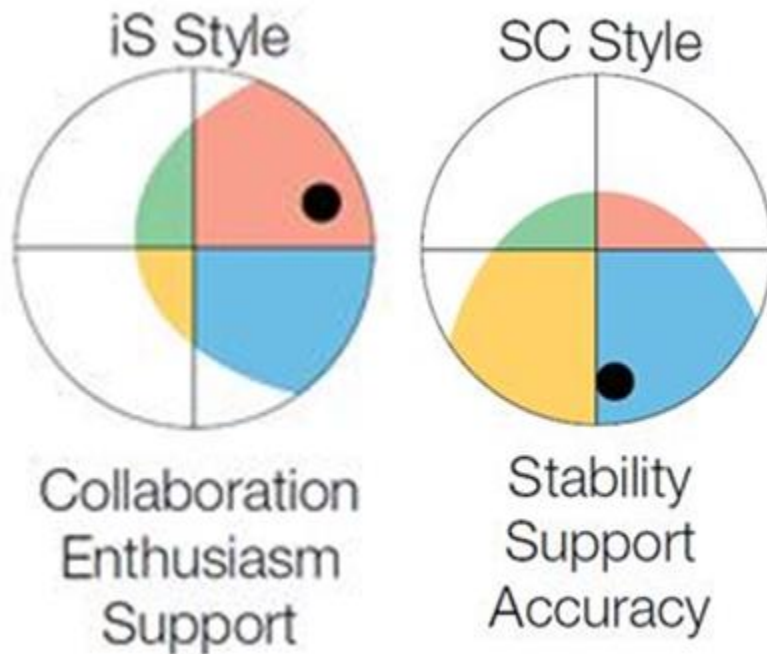
- Being curt, cold or tight-lipped.
- Controlling the conversation.
- Driving on facts and figures, alternatives, abstractions.

## DiSC for Client Coordinator

### DiSC Assessment & Behavioral Styles - Everything DiSC Workplace



## Ideal DiSC - iS Style or SC Style is ideal for this position



### Value to the Organization

Below you will find some talents and behaviors that are ideal for this position in the organization.

- Builds good relationships.
- Creative problem solving.
- Works for a leader and a cause.
- Verbalizes her feelings.
- People-oriented.
- Service-oriented.
- Builds confidence in others.
- Dependable team player.

## Word Descriptions

Demanding Egocentric Driving Ambitious Pioneering Strong-Willed Forceful Determined Aggressive Competitive Decisive Venturesome Inquisitive Responsible	Effusive Inspiring Magnetic Political Enthusiastic Demonstrative Persuasive Warm Convincing Polished <b>Poised</b> <b>Optimistic</b> <b>Trusting</b> <b>Sociable</b>	Phlegmatic Relaxed Resistant to Change Nondemonstrative Passive Patient Possessive <b>Predictable</b> <b>Consistent</b> <b>Deliberate</b> <b>Steady</b> <b>Stable</b>	Evasive Worrisome Careful Dependent Cautious Conventional Exacting Neat Systematic Diplomatic Accurate Tactful Open-Minded Balanced Judgment
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<b>Conservative</b>			<b>Firm</b>
Calculating Cooperative Hesitant Low-Keyed Unsure Undemanding Cautious Mild Agreeable Modest Peaceful Unobtrusive	Reflective Factual Calculating Skeptical Logical Undemonstrative Suspicious Matter-of-Fact Incisive Pessimistic Moody Critical	Mobile Active Restless Alert Variety-Oriented Demonstrative Impatient Pressure-Oriented Eager Flexible Impulsive Impetuous Hypertense	Independent Self-Willed Stubborn Obstinate Opinionated Unsystematic Self-Righteous Uninhibited Arbitrary Unbending Careless with Details

## Communication Tips

**When communicating with a person who is dependent, neat, conservative, perfectionist, careful and compliant:**

- Prepare your "case" in advance.
- Stick to business.
- Be accurate and realistic.

**Factors that will create tension or dissatisfaction:**

- Being giddy, casual, informal, loud.
- Pushing too hard or being unrealistic with deadlines.
- Being disorganized or messy.

**When communicating with a person who is ambitious, forceful, decisive, strong-willed, independent and goal-oriented:**

- Be clear, specific, brief and to the point.
- Stick to business.
- Be prepared with support material in a well-organized "package."

**Factors that will create tension or dissatisfaction:**

- Talking about things that are not relevant to the issue.
- Leaving loopholes or cloudy issues.
- Appearing disorganized.

**When communicating with a person who is patient, predictable, reliable, steady, relaxed and modest:**

- Begin with a personal comment--break the ice.
- Present your case softly, nonthreateningly.
- Ask "how?" questions to draw their opinions.

**Factors that will create tension or dissatisfaction:**

- Rushing headlong into business.
- Being domineering or demanding.
- Forcing them to respond quickly to your objectives.

**When communicating with a person who is magnetic, enthusiastic, friendly, demonstrative and political:**

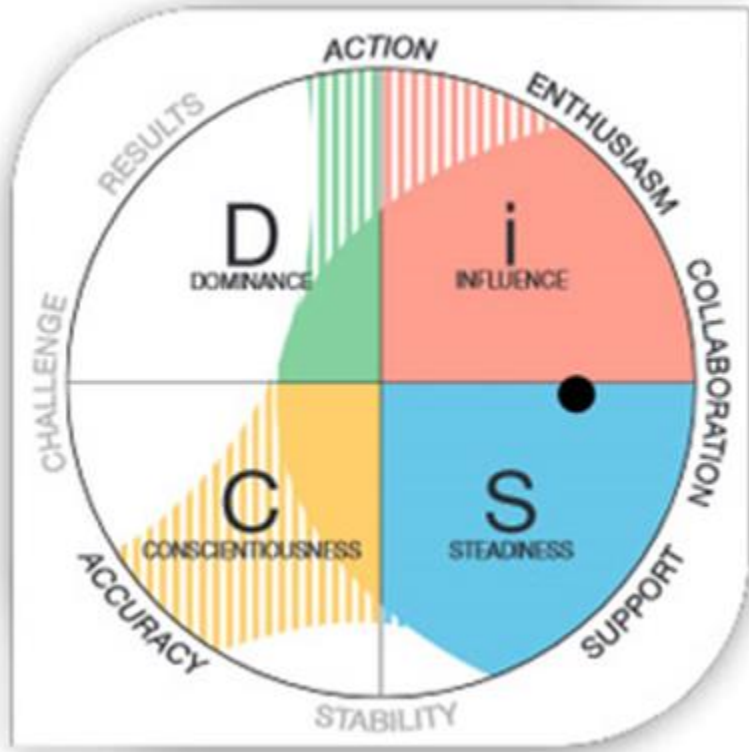
- Provide a warm and friendly environment.
- Don't deal with a lot of details (put them in writing).
- Ask "feeling" questions to draw their opinions or comments.

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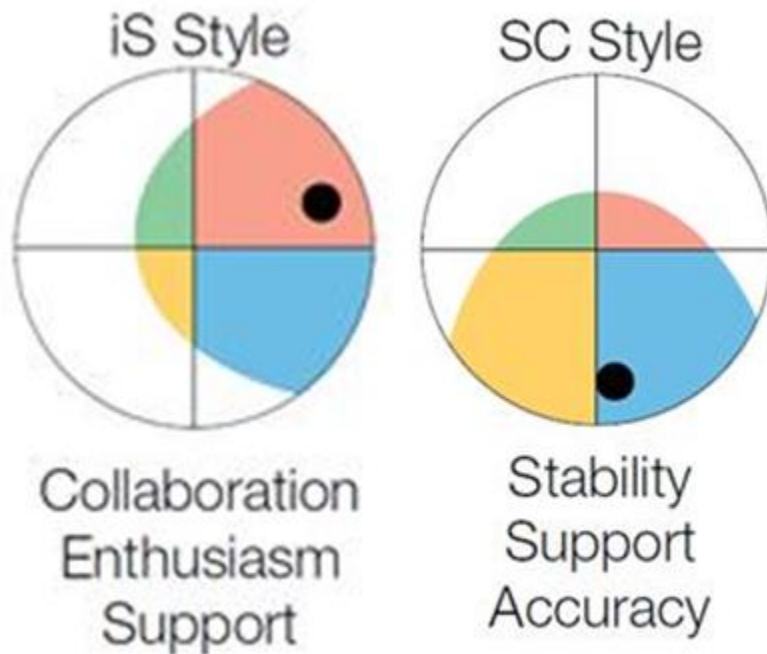
- Being curt, cold or tight-lipped.
- Controlling the conversation.
- Driving on facts and figures, alternatives, abstractions.

## DiSC for Property Inspector

### DiSC Assessment & Behavioral Styles - Everything DiSC Workplace



## Ideal DiSC - iS Style or SC Style is ideal for this position



### Value to the Organization

Below you will find some talents and behaviors that are ideal for this position in the organization.

- Adaptable.
- Comprehensive in problem solving.
- Conscientious and steady.
- Always looks for the practical solutions.
- Will gather data for decision making.
- Objective--"The anchor of reality."
- Respect for authority and organizational structure.
- Turns confrontation into positives.

## Word Descriptions

Demanding Egocentric Driving Ambitious Pioneering Strong-Willed Forceful Determined Aggressive Competitive Decisive Venturesome Inquisitive Responsible	Effusive Inspiring Magnetic Political Enthusiastic Demonstrative Persuasive Warm Convincing Polished Poised Optimistic Trusting Sociable	Phlegmatic Relaxed Resistant to Change Nondemonstrative Passive Patient Possessive <b>Predictable</b> <b>Consistent</b> <b>Deliberate</b> <b>Steady</b> <b>Stable</b>	Evasive Worrisome Careful Dependent Cautious Conventional Exacting <b>Neat</b> <b>Systematic</b> <b>Diplomatic</b> <b>Accurate</b> <b>Tactful</b> <b>Open-Minded</b> <b>Balanced Judgment</b>
<b>Dominance</b>	<b>Influencing</b>	<b>Steadiness</b>	<b>Compliance</b>
<b>Conservative</b> <b>Calculating</b> <b>Cooperative</b> <b>Hesitant</b> <b>Low-Keyed</b> Unsure Undemanding Cautious Mild Agreeable Modest Peaceful Unobtrusive	<b>Reflective</b> <b>Factual</b> <b>Calculating</b> Skeptical Logical Undemonstrative Suspicious Matter-of-Fact Incisive Pessimistic Moody Critical	Mobile Active Restless Alert Variety-Oriented Demonstrative Impatient Pressure-Oriented Eager Flexible Impulsive Impetuous Hypertense	Firm Independent Self-Willed Stubborn Obstinate Opinionated Unsystematic Self-Righteous Uninhibited Arbitrary Unbending Careless with Details



## Communication Tips

**When communicating with a person who is dependent, neat, conservative, perfectionist, careful and compliant:**

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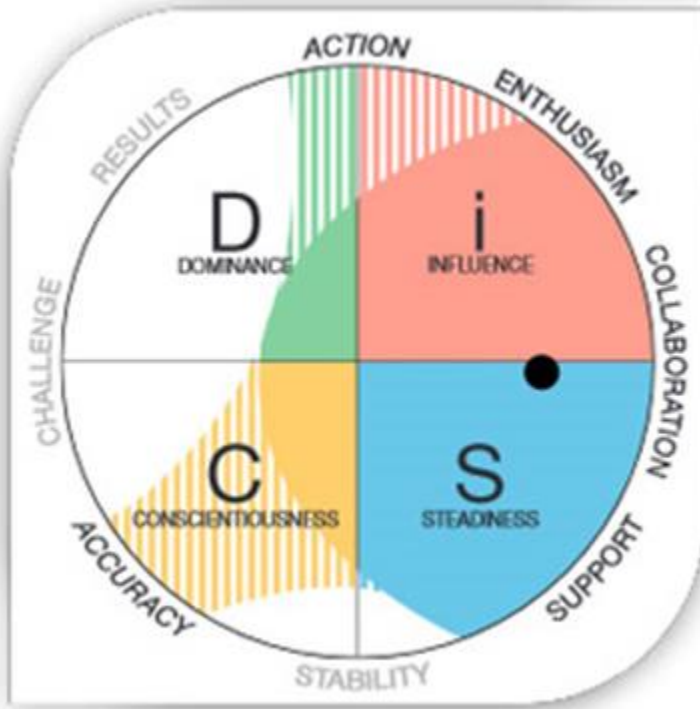
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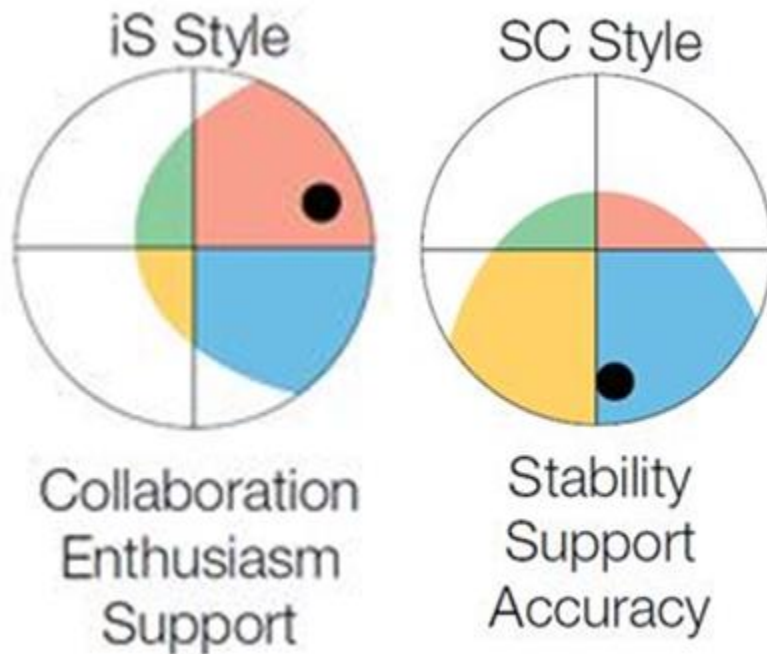
- Being curt, cold or tight-lipped.
- Controlling the conversation.
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## DiSC for Admin and Customer Service

### DiSC Assessment & Behavioral Styles - Everything DiSC Workplace



## Ideal DiSC - iS Style or SC Style is ideal for this position



### Value to the Organization

Below you will find some talents and behaviors that are ideal for this position in the organization.

- People-oriented
- Good at reconciling faction-calming and adds stability
- Flexible
- Respect for authority and organizational structure
- Turns confrontation into positives
- Adaptable
- Concerned about quality
- Works for a leader and a cause
- Consistent and steady.

## Word Descriptions

Driving	Inspiring	Relaxed	Cautious
Ambitious	Magnetic	Passive	Careful
Pioneering	Enthusiastic	Patient	Exacting
Strong-Willed	Persuasive	Possessive	Systematic
Determined	Convincing	Predictable	Accurate
Competitive	Poised	Consistent	Open-Minded
Decisive	Optimistic	Steady	Balanced Judgment
Venturesome	Trusting	Stable	Diplomatic
<b>Dominance</b>	<b>Influencing</b>	<b>Steadiness</b>	<b>Compliance</b>
Calculating	Reflective	Mobile	Firm
Cooperative	Factual	Active	Independent
Hesitant	Calculating	Restless	Self-Willed
Cautious	Skeptical	Impatient	Obstinate
Agreeable	Logical	Pressure-Oriented	Unsystematic
Modest	Suspicious	Eager	Uninhibited
Peaceful	Matter-of-Fact	Flexible	Arbitrary
Unobtrusive	Incisive	Impulsive	Unbending

## Communication Tips

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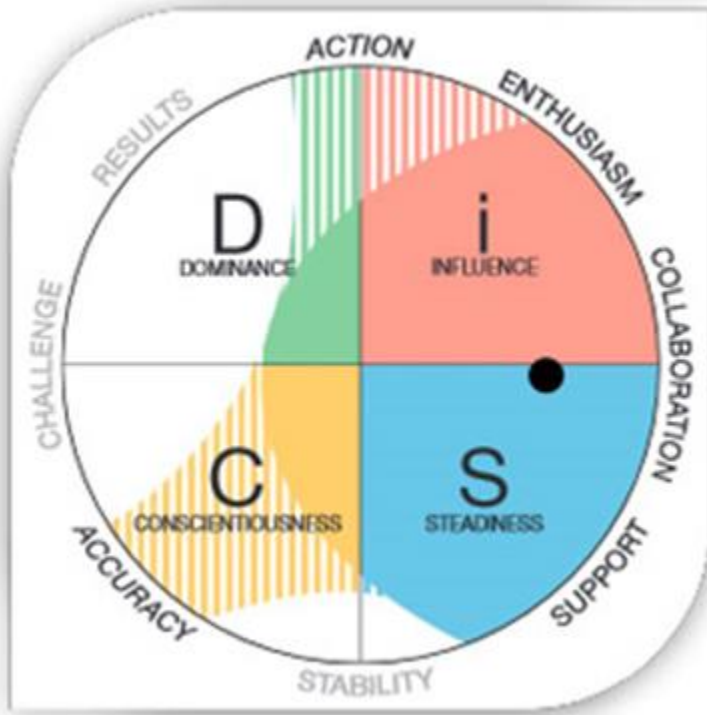
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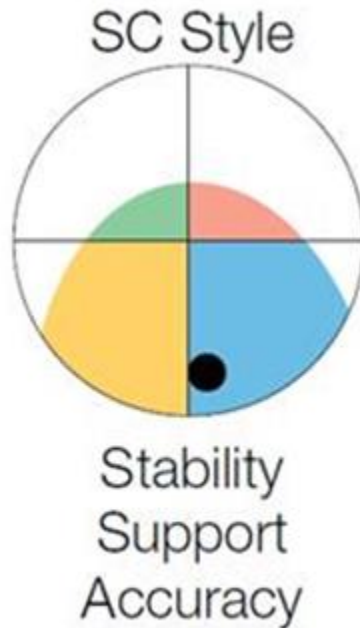
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## DiSC for Accounting Associate

### DiSC Assessment & Behavioral Styles - Everything DiSC Workplace



## Ideal DiSC - CS Style or SC Style is ideal for this position



### Value to the Organization

Below you will find some talents and behaviors that are ideal for this position in the organization.

- Optimistic and enthusiastic.
- People-oriented.
- Accomplishes goals through people.
- Respect for authority and organizational structure.
- Flexible.
- Builds confidence in others.
- Creative problem solving.
- Verbalizes feelings.

## Word Descriptions

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Strong-Willed	Persuasive	Possessive	Systematic
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