2017

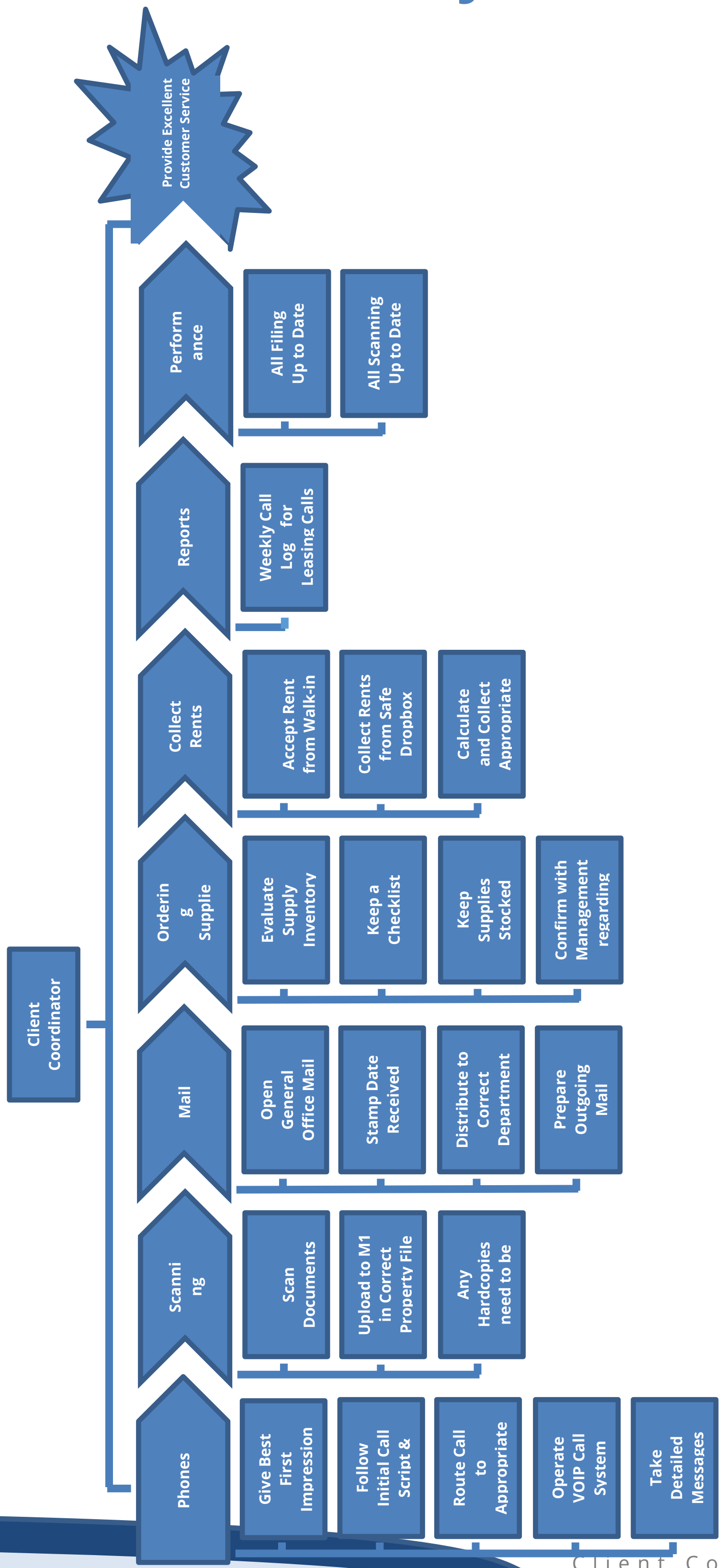
Client Coordinator Manual

MANAGEMENT ONE LICENSED OPERATING SYSTEMS

KNOWLEDGE BASED MANUAL

Contents

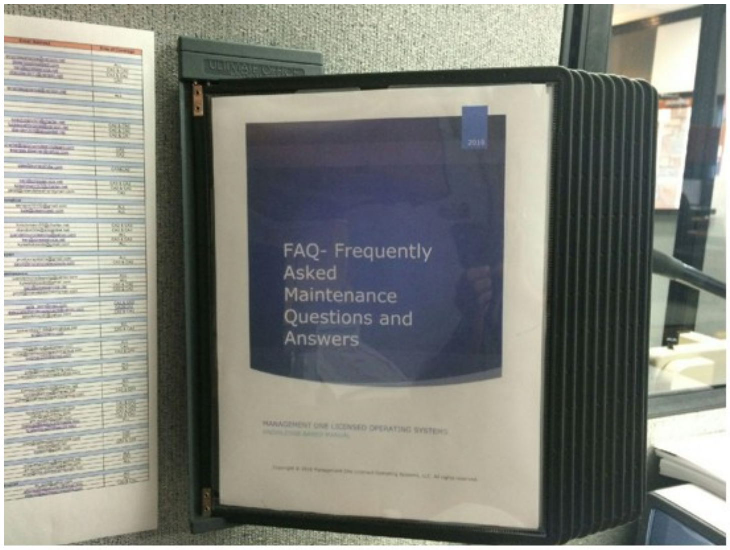
Client Coordinator Job Flow Visualized

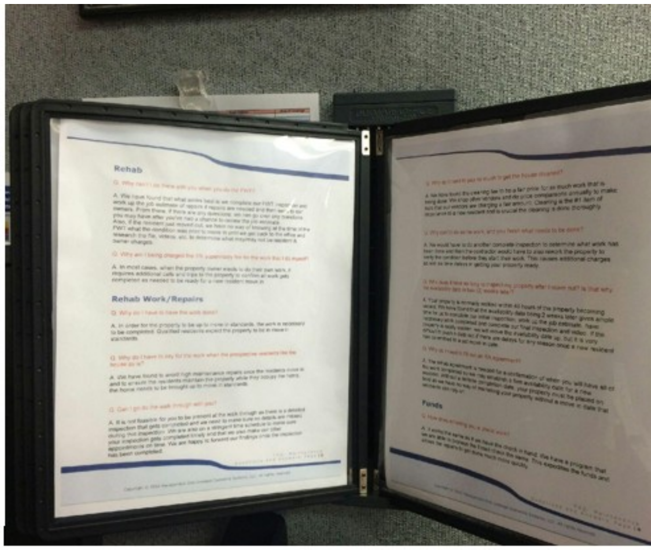


FAQ- Frequently Asked Client Coordinator Questions and Answers

[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"]

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 denote 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)

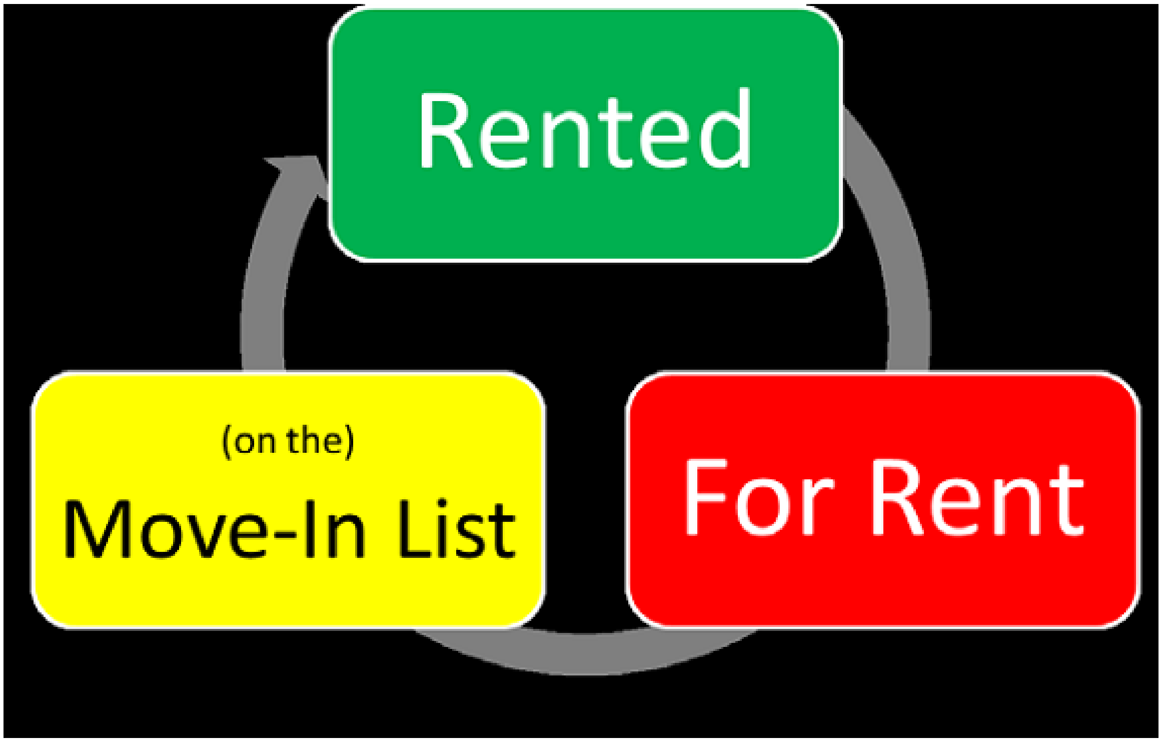
White Label - **Rented / Move-in**

Property is rented and waiting for the new resident to move in (1 set of keys if the property if 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 id 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.

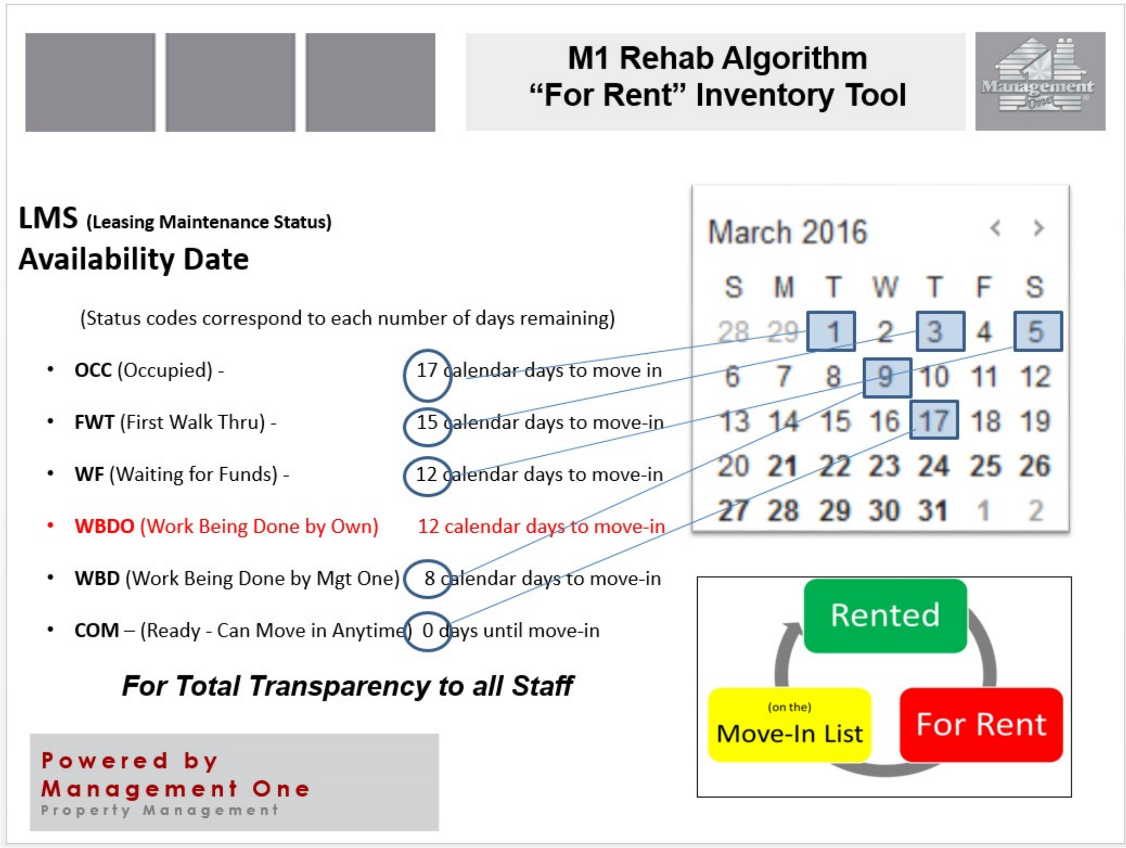
3 sets of keys with White Address Tags **(V - VAC) Vacant**

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



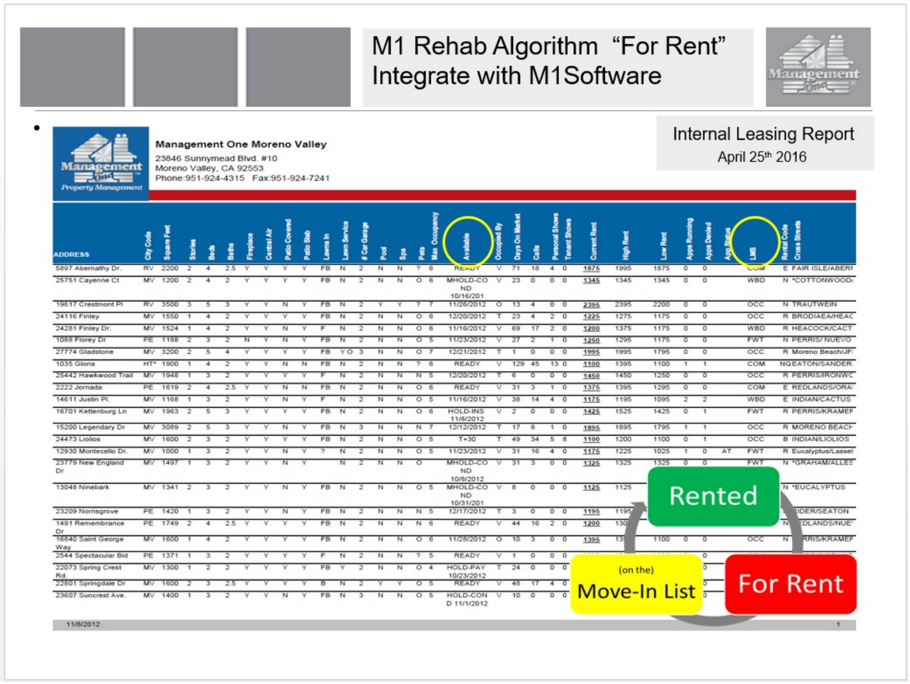
This Algorithm is used to determine the Date a property can be Available for a Resident to take possession.

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.

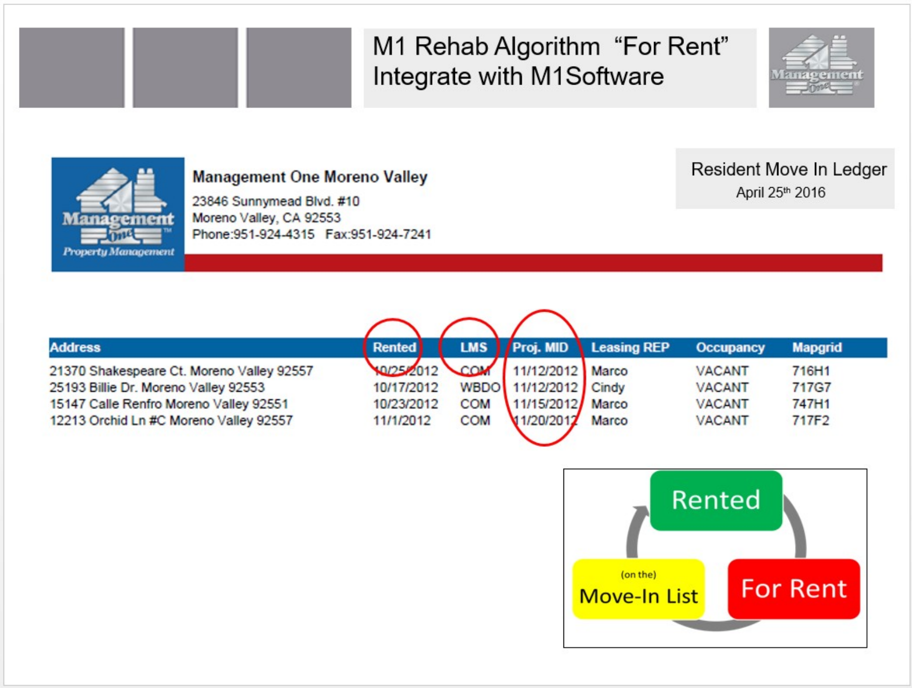
As the schedule progresses each status acts as a milestone with a certain number of days afforded for that phase in the process. It will be very apparent if there is an issue in meeting the deadline to make this property available by the calculated date, if the property status does not correlate with 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" utilizing the Resident Move In Ledger (RML)



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 residents turn 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 (PRI) Prospective Resident Inquiry 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. You can do this in an electronic task page, as well, if preferred.

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)

Job Description

The Client Coordinator position is one of importance. As the Client Coordinator, your main responsibility is to make sure the office runs smoothly. In doing this, many daily and weekly task need to be performed, as well as projects that may be assigned to you.

Procedures are listed in importance and frequency. Each of these must be done by company policy. As the company grows, these policies are likely to change. There is always room for suggestions.

Being a Client Coordinator can be a fun busy job. It is your responsibility to direct traffic to conference rooms, applications, etc. Answering the phone, ordering supplies, and collecting rents are all responsibilities that must be watched over in order to keep the office running smoothly.
Good luck in your new position!

Goals for Client Coordinator

- Direct phone calls to the correct division
- Answer phone by 3 rings
- Phones to be turned on by 9:00 AM not 9:01 AM and ready to answer (Hours of operation may vary)
- Keep front lobby clean and organized
- Turn on all TV's, DVD player and music, if applicable, turn off at the end of the day
- Greet customers and make them feel welcome
- Keep drawers stocked
- Complete verbal and written projects
- Make sure copier is always stocked with paper
- Order Supplies and Stock them when they arrive- click here for a complete supply list
- Stamp Envelopes, fold letters, stuff and mail
- Check mail daily
- Mail outgoing mail daily
- Prep rent receipts (cut, stamp, staple, alphabetize)
- Receive rents from residents that pay in office
- Keep up on scanning, filing and copies needed from staff
- Prep new resident files
- Prep PI's rehab (FWT)-watch videos
- Process new pros owner calls- get name, email and phone number, notify new accounts and send out E1 email
- Prep for staff meetings and take meeting minutes, email to staff
- Print out reports (ILR and RML) for daily Huddle
- Log all complaint calls that come in, send report to manager each Friday end of day
- Assist with mailing out referral cards to agents
- Receive keys from residents upon move-out, give them a key form to fill out
- Assist team members with items that are needed such as running credit checks, checking out keys, confirming annual inspection appointments, etc.
- Make copies of any paper that residents turn in such as receipts, lease renewals and give COPY to resident, keep the original.

- Make up Welcome Packets for new residents
- Assist with preparing for monthly team meeting (ordering lunch, etc.)

Daily Checklist

Certain duties must be performed daily in order to keep office running smoothly.

MORNING:

1. Check night drop off for any items
2. Turn on conference room lights
3. Pick up messages off the machine
4. Unlock the office doors
5. Make sure front office in order and items are stocked for the day
6. Turn on TV's and Video
7. Print out Leasing reports for meeting @ 8:30 AM

BEFORE LUNCH:

1. Lock the front door

AFTER LUNCH:

1. Check night drop off for any items
2. Pick up messages from the machine
3. Unlock the front door

CLOSING TIME:

1. Lock the front door
2. Turn off lights throughout office
3. Turn off TV's, DCD player and music

Phone Calls

This is where the majority of your work will take place. It is your responsibility to make sure that the telephones are answered in a pleasant and timely manner.

It is important that the word "timely" be taken seriously. In saying this, the telephone should never ring more than three times before it is answered. Many potential clients may be lost if they have to let it ring longer.

When answering the telephone, you will want to know where to direct it to.

A suggested way to do this: "Thank you for calling <<company name>>, how may I direct your call?"

When putting a call through: Announce who the caller is and hang up your phone.

When screening a call, it is not polite to say, **"May I ask who is calling?" It is better to say, "And your name is?"**

Let them tell you who they are without realizing that they are telling you. When transferring the call to staff your quote is as follows: **Jay "You have a call"**, or if you get their name, **Jay "Mr. Jones is on the line."**

When transferring a call, use the words, **"It will be my pleasure to connect you"**, or simply, **"My pleasure"**.

<u>PHONE CALLS TO SALES REP'S</u>

Enter the person's name, email and phone number directly into M1. Send the first email out to the client, if the provided their email. This allows them to review some information prior to the sales person returning their call. It also gives them the sense that they are important and provides prompt service. Send an email notification to the sales rep via M1, as well as an email text.

This decreases the down time between when the call comes in and when the sales rep calls the client back.

Be sure not to confuse an owner to who wants management to a resident who wants to rent a property. A key question to ask if you're not sure is: "Mrs. Jones, are you looking to have your home managed or do you want to rent out a home?"

Additional Tasks

In addition to your daily jobs that you have, you will also be responsible for weekly and monthly tasks.

1. **ORDER SUPPLIES**
   a. It is important that you keep on top of ordering. Ordering is done normally once a month as supplies are needed. Click here to download a supply list

2. **TAKE CARE OF COPY MACHINE**
   a. Every day you are to wipe down the glass on the copy machine, and stock with paper. It is also a good time to make sure that the lobby is clean, and the tables are wiped down, if necessary.

3. **STOCK AND SUPPLIES**
   a. Stock copy machine, printers, etc. with paper.
   b. Keep office supplies stocked at co-worker's work stations.
   c. Keep forms stocked at co-worker's work stations.

4. **LOBBY**
   a. Keep lobby/office clean.
   b. Keep conference rooms clean.
   c. Direct traffic in lobby to appropriate place.

5. **FILING**
   a. Keep all property files up to date.

6. **Mail**
   a. All outgoing mail should be stamped and mailed daily.

Rent Collection

During the last week and first week of the month, you will be receiving the majority of the resident's rent. This can be a hectic time; the important thing to remember is to STAY ORGANIZED!

Accounting will bring you a stack of rental receipts around the 25th of each month.

When residents begin to bring in rent, make sure it is in form of cashier's check or money order, if they pay by a personal check, they must be on the personal check list. And, **under NO CIRCUMSTANCES, accept cash**.

Make sure that all forms of rent have a correct address on it. Take the receipt from the alphabetizer, and fill it out. The top copy gets clipped to the rent, and the bottom copy goes to the resident.

After the receipt and rent have been clipped together, place it in the rent box. If someone is on the Eviction Ledger, **DO NOT ACCEPT RENT**, or any other type of funds.

Operating the Phone System

Depending on your phone system, list out the basic instructions on how to turn the phones on/off as well as how to retrieve voice mail messages. Write out the instructions below or provide a copy of the basic instructions from your phone/voicemail provider.

To turn on the phones:

To turn off the phones (forward to voicemail):

To retrieve voicemail: