

## **A PROPERTY MANAGEMENT CHECKLIST SYSTEM, “STOP THE FIRES”**

### **INTRODUCTION**

#### **REVIEWING THE CHECKLIST SYSTEM**

“Stop the Fires” Product Goal

“*Stop the Fires*” Content

#### **GETTING STARTED**

Networked?

Store Documents Wisely!

Create a “New” File Folder

Using a Download

Using a CD-Only or Workbook + CD-ROM

Check “Read Only”

Why read the manual?

#### **GET “HELP”**

Many Ways to Obtain Help

#### **USING TABLES = PROFESSIONAL CHECKLISTS**

The Importance of Tables

Key Table Tips

Get “Help” on Tables

Tables Toolbar

Practice on the LandlordSource “Sample Checklist”

Sample Practice Checklist

Corrected Sample Checklist

#### **FIND AND REPLACE - THE KEY TO CHANGING RECURRING WORDS**

##### **FORMS TOOLBAR**

The Key to Electronic Checklists

Using a “Protected” Checklist

##### **HEADERS AND FOOTERS**

The Key to Tacking/Dating Documents

##### **FILE MANAGEMENT**

The Key to Managing Checklists

##### **CREATING A PROFESSIONAL IMAGE**

Spelling

Grammar

Thesaurus

##### **INVALUABLE COMPUTER TIPS**

Backup, Backup, and then Backup Again!

Use the Office Clipboard

##### **SEVEN KEYS TO ORGANIZING A PROPERTY MANAGEMENT OFFICE ..... ERROR! BOOKMARK NOT DEFINED.**

1 - Competent Personnel

2 - Professional Forms & Manuals

3 - Interactive Documents

- 4 - Productive Checklists
- 5 - Organized Files – Paper and Electronic
- 6 - Personnel Training
- 7 - Consistent Reviews

**FIVE (5) STEPS TO ACHIEVE THE SEVEN KEYS**

- 1 - Take a picture
- 2 - Select Priorities
- 2 - Map a plan
- 4- Implement the plan
- 5 - Review the picture

**FINDING THE RIGHT TOOLS**

- Forms, Letters, and Agreements, 2<sup>nd</sup> Edition
- Forms, Letters, and Agreements, PROMAS Version
- Policy & Procedures Manual for Property Management
- Policy & Procedures Manual for Real Estate
- Combination Policy & Procedures Manual for Real Estate & Property Management
- Employee Manual/System for the Real Estate/Property Management Office
- Property Management Systems for Owners, Tenants, and Vendors
- The Property Management Recovery System

**THE CHECKLIST FAQs**

- Why use checklists?
- Why do I have to have so many checklists?
- Who needs to use checklists?
- What checklists are included with this product?
- What makes this product different?
- What creates the most professional checklists?
- What personnel should use the checklists?
- What if I need another checklist not listed in this product?
- What checklists are included or not included in other products?
- Where do I start?
- How can I possibly use ALL these checklists?
- How do checklists eliminate more paper and work?
- How can I use the checklists electronically instead of using paper?
- When do checklists create too much control and negate productivity?

**USING CHECKLISTS EFFECTIVELY**

- Use Electronic Checklists When Possible
- Initiate Routing Systems
- Assign the Right Personnel
- Use Color Coding

**STEP 1 – THE “7 CHECKLIST TEST”**

- What IS the “7 Checklist Test?”

## Forms Definitions

Why USE the “7 Checklist Test?”

Do NOT Be Discouraged

Don’t Reinvent the Wheel!

#1 - Business Overview Checklist

#2 – Property Management Overview

#3 – Property Management Compliance Checklist

#4 –Personnel Overview Checklist

#5 – Client/Owner Organization Checklist

#6 – Tenant Organization Checklist

#7 – Vendor Organization Checklist

Use the Priority Checklist

### **STEP 2 – KEY PROPERTY MANAGEMENT CHECKLISTS**

#8 – Management-Inquiry Checklist

#9 – Management Package Checklist

#10 – New Owner Checklist

#11 – New Property/Tenant Checklist

#12 – New Property Maintenance Checklist

#13 – Lease Only Checklist

#14 – Tenant Application Checklist

#15 – Move In Checklist

#16 – Renew Lease/Rental Agreement Checklist

#17 – Add/Remove Tenant Checklist

#18 - Add/Remove Pet Checklist

#19 – Drive-by Checklist

#20 – Tenant Violation Checklist

#21 – Lead-based Paint Work Checklist

#22 – Mold Problem Checklist

#23 – Property Survey Checklist

#24 – Move-Out Checklist

#25– Security Deposit Refund Checklist

#26 – Unlawful Detainer/Eviction Checklist

#27 – Client Termination Checklist

#28 – Property Termination Checklist

#29 – Fair Housing Complaint Checklist

### **STEP 3 –OFFICE ORGANIZATION CHECKLISTS**

#30 – Personnel Checklist

#31 – Vendor Checklist

#32 – Office Supply Checklist

#33 – Insurance Review Checklist

#34 – Office Inventory Checklist

- #35 - Software Records
- #36 – Required Office Poster Checklist
- #37 – Trust Account/Audit Checklist
- #38 - Year-end Checklist
- #39 – Office Vacation Checklist
- #40 – Personal Vacation Checklist

**REVIEWING CHECKLISTS**

Do your checklists work?

What Not to Do With Checklists

**FREQUENTLY ASKED CHECKLISTS QUESTIONS**

**INSTRUCTIONS FOR 2007 MICROSOFT WORD®**

Major Changes in Microsoft Word® 2007 Layout

Moving the Quick Access Toolbar Location

Special tip for the Quick Access Toolbar

Turn On the “Developer Tab

Getting Help in Microsoft Word® 2007

Using Find & Replace in Microsoft Word® 2007

Using Header & Footer in Microsoft Word® 2007

Finding Heading & Styles

Using Table of Contents

Protect & Unprotect/Fill-In Forms/Forms Fields/Forms Toolbar

**APPENDIX**

Checklist Directory and Descriptions

Form Definitions