

**MASTERING  
ONLINE  
CHECKLISTS**  
Successful Online  
Tools to Stay  
Connected & Productive

**BETTER LANDLORD**  
TAKE THE PROPERTY MANAGEMENT CHAOS

Jennifer Kellogg, MPM® RMP®  
Courtney Warnock, RMP®



**Business  
Card  
Drawing**

**\$50  
Amazon  
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**SHOUT OUT!**

**Betty Fletcher MPM® RMP®**  
Past NARPM President  
Mentor and Friend

**OUR STORY**



**WHAT YOU'LL LEARN:**

- ✓ Why Checklists are Important
- ✓ Create Powerful Checklists
- ✓ Online Tools
- ✓ Implementation

**1**

**WHY  
CHECKLISTS  
ARE  
IMPORTANT**



## 4 Reasons You Need Checklists:

1. Define Policy
2. Reduce Risk
3. Improve Customer Service
4. Train Employees

1

## Define Policy:



Get it out of your head

Make SMART decisions ONCE

Less stressful

1

## Reduce Risk:



Comply with the law

Lawsuits are expensive

1

## Improve Customer Service:



Creates consistency

Empowers employees

1

## Train Employees:



Defines responsibilities

Provides structure

Reduces failure

Easy to fill-in

1

## 5 Reasons You Want Checklists:

1. Work Remotely
2. Less Stress
3. Fewer Interruptions
4. More Time
5. More Profit

1

## Work Remotely:

Traveling for work  
On vacation



1

## Less Stress:

Get everything out of your head  
Enjoy going to work



1

## Fewer Interruptions:

Stop putting out fires  
More time to concentrate



1

## More Time:

More personal time  
More family time  
More time growing your business



1

## More Profit:

More Money  
More Options



1

"Under conditions of complexity, not only are checklists a help, they are required for success."

~ Atul Gawande [The Checklist Manifesto](#)

2

## CREATE POWERFUL CHECKLISTS



## 5 Steps to Create a Checklist:

1. Choose ONE Activity
2. Systematize Policies & Procedures
3. Interview Your Staff
4. Keep It Simple
5. Put Your Checklists Online

2

## Choose ONE Activity:



Break the rent cycle into distinct activists

Don't combine unrelated tasks

2

## Systematize Policies & Procedures:



Let your policies & procedures manual be your guide

Use checklists to build a P&P manual

Mirrors your services

2

## Interview Your Staff:



Who initiates an activity?

What are the tasks that need to be done?

Who does which tasks?

What is the most efficient order of tasks?

2

## K - I - S - S:



K - Keep tasks short

I - Include only the task, not how to do it

S - Start with verbs UPLOAD, EMAIL, ENTER, SEND, etc.

S - Sections by employee

2

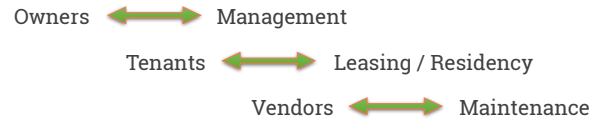
## Put Checklists Online:



- Work remotely
- Monitor progress
- Improve communication
- Update easily
- Save hours formatting paper checklists

2

## Essential Checklists:



2

## Owners - Management:

- Management - New
- Management - Pay Owners
- Management - Term after MO
- Management - Term Vacant
- Management - Term by PM Co
- Management - Term Transfer TNT
- Management - Term Transfer OWN
- Management - Lease Only

2

## Tenants - Leasing/Residency:

- Tenant - Move In
- Tenant - Lease Renewal
- Tenant - Move Out\*
- Tenant - Move Out 30 Day Notice
- Tenant - Add Resident\*
- Tenant - Remove Resident\*
- Tenant - Add Pet\*
- Eviction - Sandoval County
- Eviction - Bernalillo County
- Section 8 - Inspections

\* form on website

2

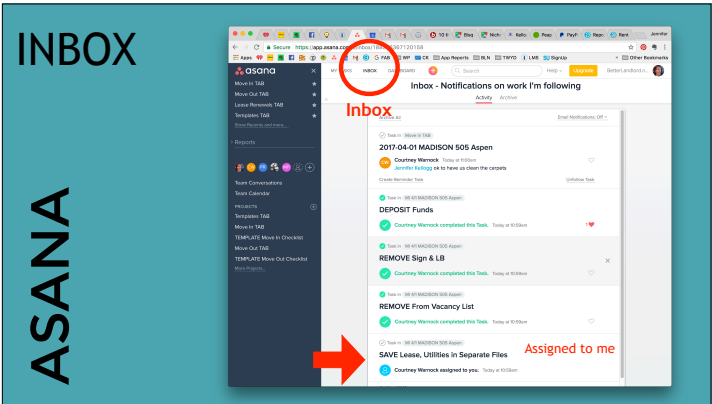
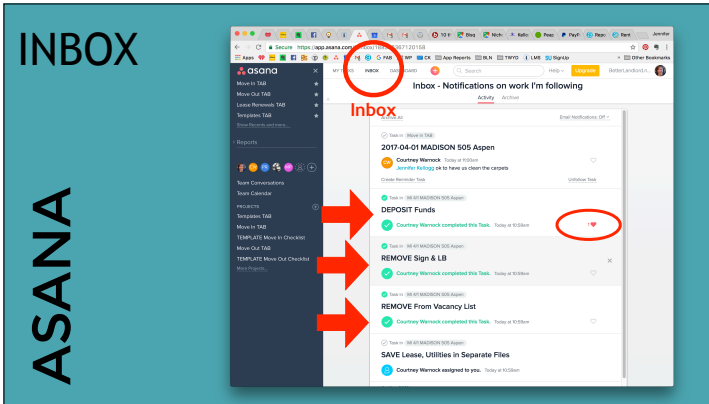
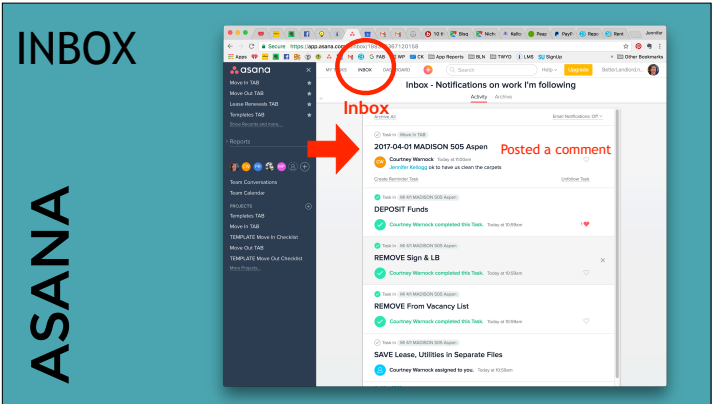
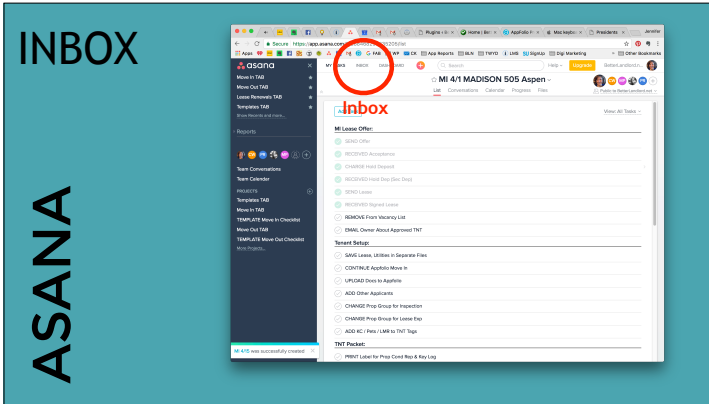
## Vendors / Maintenance:

- Maintenance - New Mgmt Make Ready
- Maintenance - Periodic Inspections
- Maintenance - Move Out Make Ready
- Maintenance - Fireplace Inspections
- Maintenance - Evap Cooler Conversions Fall
- Maintenance - Evap Cooler Conversions Spring

2

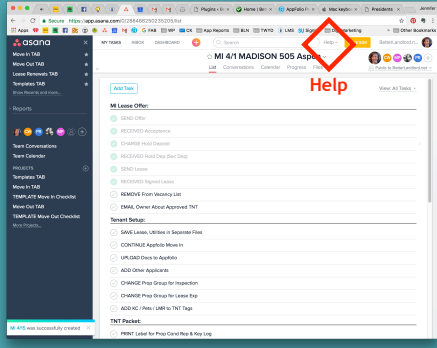
"One essential characteristic of modern life is that we all depend on systems - on assemblages of people or technologies or both - and among our most profound difficulties is making them work."

~ Atul Gawande *The Checklist Manifesto*



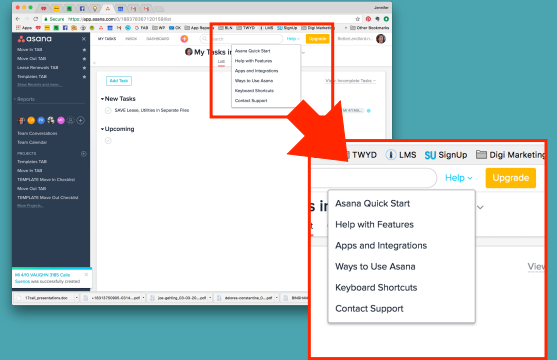
# HELP

ASANA



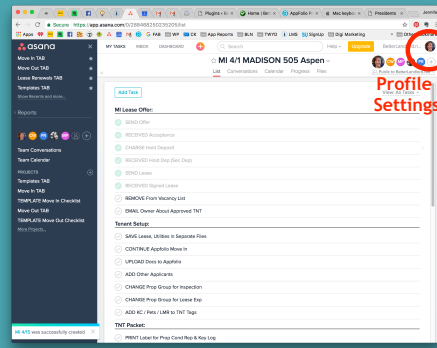
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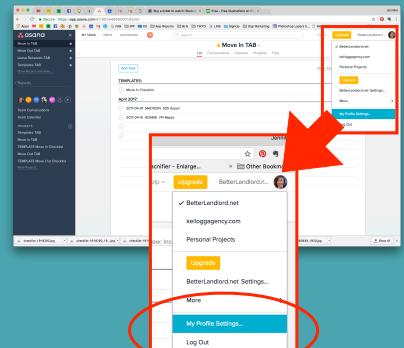
# PROFILE SETTINGS

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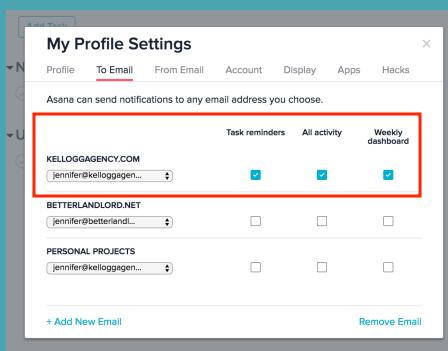
# PROFILE SETTINGS

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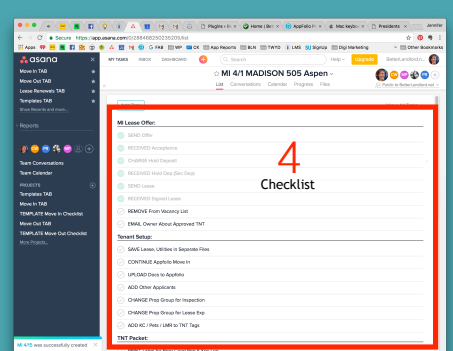
# PROFILE SETTINGS

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# CHECKLIST IS CALLED A PROJECT

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## Checklist = Project:



- Create tasks
- Assign tasks
- Discuss tasks
- Supervise staff

3

*Checklist Video*  
[BetterLandlord.net/NARPM](http://BetterLandlord.net/NARPM)

4

IMPLEMENTATION



## Training:

- Help Videos
- Training Videos



4

## Incentives:

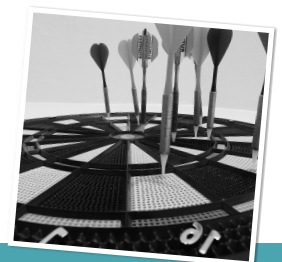
- Lunch for the Staff
- Time Off
- Gift Card



4

## Feedback:

- Allow Staff to Make Updates
- Easy to Update
- Supervision



4



