

2019

BROKER / OWNER
Conference & Expo



Dealing with Unexpected Changes in Personnel when Life Throws Curve Balls

Kellie Tollifson, MPM RMP
T-Square Properties

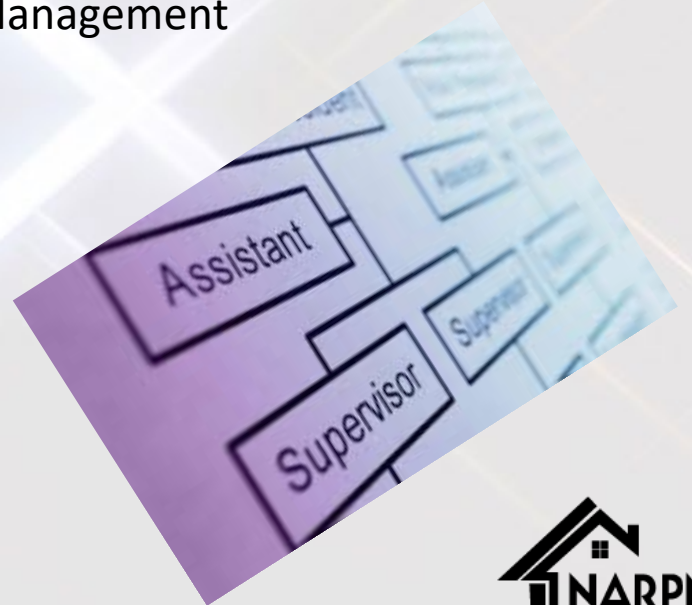
Anne McCawley, MPM RMP
Bennett Property Management, CRMC

Melissa Sharone, MPM RMP
First Rate Property Management, CRMC

Anne McCawley, MPM RMP

Bennett Property Management, CRMC

- Company Structure – Portfolio Style Management
- Designated Broker
- CFO/Office Manager
- Bookkeeper/Accounts Receivable
- Office Support
- 15 Property Managers



KEY PERSONNEL – SUDDENLY NOT AVAILABLE



WHO?



WHAT?

HOW LONG?





Look Around





SHARING



CARING

Melissa Sharone, MPM RMP
First Rate Property Management, CRMC

Policies and Procedures
Checklists
Clear Job Descriptions



WRITE IT DOWN!!



Melissa Sharone, MPM RMP
First Rate Property Management, CRMC

Do you know what your employees do?

Can someone else in the office do their work?

Do you have your replacement trained?



TASK LIST:	YES NO												
	Melissa	Jim	Kurtis	Kristen	Rose	McKenzie	Beny	Julie	Arica	Lauren	Bri	Chris	Lacey
Evictions	X	X		X									
Hiring	X												
Office Supplies	X												
Managing Team	X	X	X	X	X			X					
Outgoing Owners	X			X									
Blog	X							X					
Payroll	X												
Meetings	X	X	X	X	X		X						
Disputes	X	X	X	X				X					
Centratel Calls	X	X			X							X	
E-mails	X	X	X	X	X		X	X					
Phone Messages	X	X	X	X	X		X	X					
overflow work/ all departments	X	X		X									
special projects	X	X		X									
reviews- EMPLOYEE	X			X				X					
complaints	X	X		X				X					
strategic planning	X	X	X	X	X								
NARPM	X		X	X									
owner corredpondence	X	X	X	X				X					
Party/event planning	X	X		X									
bank recs	X		X		X	X							
Employee Benefits	X												
On boarding for new staff	X												
FRPM Financials			X										
Owner insurance	X	X	X	X				X					
Computer set up	X			X									
Updating website	X							X					

TASK LIST:													
	Melissa	Jim	Kurtis	Kristen	Rose	McKenzie	Julie	Arica	Lauren	Bri	Chris	Lacey	Tyler A
Lease signing checklist	x			x			x	x					
30 Day Notices	x	x		x			x	x					
Advertising	x	x		x			x	x					
Application Process (Units & Garages)	x			x			x	x					
Lease Renewals	x			x			x	x					
Lease Takeovers	x			x			x	x					
Drive Bys	x	x		x			x	x					
Phone Messages	x	x	x	x	x	x	x	x	x	x	x	x	
Welcome Packets	x	x		x			x	x		x			x
Move In Inspections	x			x			x	x		x			
Road Warrior	x	x		x			x				x	x	x
Showings	x	x		x			x	x	x	x			
Lease Violations	x	x		x			x	x					
Property Inspections	x	x		x			x	x	x	x	x	x	
Late rent inspections	x	x		x			x	x					
Roommate Adjustments	x			x			x	x					
Office Mail	x			x			x	x	x	x			
Phone log	x			x			x	x					
RLL info	x	x		x			x	x					
Disputes	x	x	x	x	x		x						
E-mails	x	x	x	x	x	x	x	x	x	x	x	x	x
Addendums	x			x			x	x		x			
Rental Verifications (Rentals & Mortgages)	x			x			x	x		x			
Ice Melt Process	x	x		x			x						x
Home Ownership Program Sign Up	x			x			x						
Answering phones	x	x		x	x	x	x	x	x	x	x	x	x
DID	x			x			x	x					
Creating and posting notices	x	x		x			x	x	x	x	x	x	x
SECOND SIGNING	x			x			x	x					

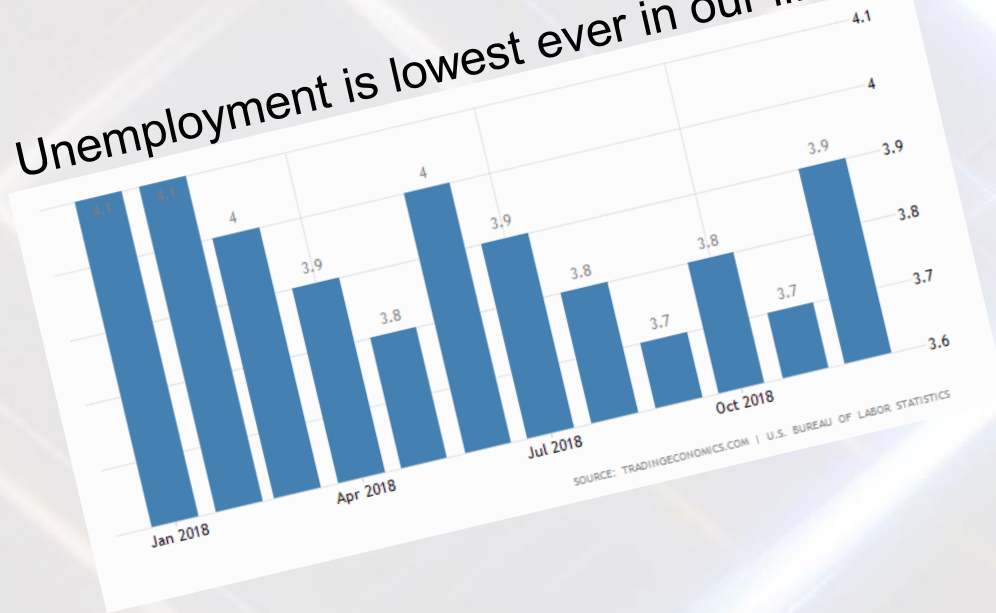
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In the midst of the CHAOS caused by changes, are you taking care of your current team?



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Unemployment is lowest ever in our lifetime.



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Exit Interview is too late

Stay Interviews



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Top 3 reasons why you remain at the company?

What are you passionate about?

If you won the lottery, what would you miss about work?



**Kellie Tollifson, MPM RMP
T-Square Properties**

If you could change anything at work
with a wand what would you change?

What motivates you?



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T-Square Properties

Education allowance

Second level of health care

Job shadowing

Short Term Disability

Accident Coverage

Fun Committee



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