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Conference & Expo

April 19-21, 2021
Mohegan Sun Resort
Uncasville, CT



PROGRAM/SCHEDULE

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MONDAY, APRIL 19, 2021

8:00 am Registration Open *Uncas Ballroom Foyer*

**9:00 am – 10:00 am Keynote Session:
Walking on Eggshells *AB Salon - Uncas Ballroom***

Conflict is inevitable, in and out of the workplace, but it doesn't need to be a barrier to success. Effective individuals skillfully navigate conflict and problems as they arise and create high performance teams and relationships by engaging in tough conversations, holding individuals accountable, and arguing productively.

You will learn:

- The role of conflict in creating high performance environments.
- To recognize problems and effectively intervene before they escalate.
- To handle disagreements respectfully and constructively.
- To create win-win solutions.

Speaker: *Dr. Sherene McHenry, CSP*

10:00 am – 10:15 am Refreshment Break *Uncas Ballroom Foyer*

10:15 am – 11:15 am Roundtable Sessions *Rooms TBD On-site*

Roundtable break-out sessions are intimate, moderated group discourses where attendees can discuss amongst peers a variety of topics important to the property management industry. The roundtables will take place over several rooms with multiple roundtables in each room. The table leader will briefly introduce the topic. Afterwards, the discussion becomes free form where the leader's only obligation is to serve as a moderator. Leaders will keep things moving along by posing a few questions if conversations begin to stall. They will make sure that everyone at the table is getting a fair chance to speak and engage with others. The objective is not to necessarily solve a problem or come to a conclusion – it is to trade ideas/thoughts with other engaged individuals with similar interests and questions.

- **Best Practices, Revenue Stream*C1 Salon – Uncas Ballroom***
- **Maintenance, Tools/Apps/
Software *C2 Salon – Uncas Ballroom***
- **Marketing, Virtual Assistants, Workflow Automation
and Time Management *AB Salon – Uncas Ballroom***

11:15 am – 11:30 am Refreshment Break *Uncas Ballroom Foyer*

11:30 am – 12:20 pm Breakout Sessions:

1. Relationship Management *C1 Salon - Uncas Ballroom*

Property management is a "relationship business." Think about all the people your team interfaces with daily in making your business successful: property owners, tenants, vendors, prospective tenants, HOAs, and more. Relationship management of the

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hundreds of individual personalities with whom you have contact is an integral part of every aspect of our property management businesses. Relationship management is not just about closing a sale or providing good customer support, but rather laying the groundwork for the best possible experience a customer has in their journey with your company. It involves maximizing the possibilities with these stakeholders to develop trust, inspire and influence, build bonds, create understanding, gain agreement, and resolve conflict. In this session, we will review ten strategies and tactics which I considered to be best practices for relationship management in a property management company and take attendees through exercises of self-assessment on how they are doing within their own organizations.

Speaker: Bob Preston, RMP®, North County Property Group

2. 10 Most Common Things That

My System Is Missing AB Salon - Uncas Ballroom

What mistakes are property managers making when creating a system? Do you have too many steps in your system? Do you expect people to skip steps by memory or does your system automatically know how to skip a step? Are your systems broken and, if so, why are they broken? How do we create systems that work and decrease mistakes? This session will answer all of these questions and more.

Speaker: Paul Kankowski, RMP®, House Match, Inc.

3. Staging Your Company to Sell C2 Salon - Uncas Ballroom

Everyone will sell someday, but few know how to get their company ready to sell. This workshop alerts managers of all sizes how to stage their company to sell, including reports and stats to start keeping; realistic options for selling their company; and how to begin building their presentation to a prospective buyer. We'll address evaluating your company; what buyers are looking for; how to get the conversation going; and what the due-diligence process looks like. We'll address the most common mistakes managers make when selling and examine several autopsies of companies that sold badly.

Speakers: Robert Locke, MPM® RMP®, Crown Investor Institute, LLC; Attorney Monica Gilroy, Esq., The Gilroy Firm

12:20 pm – 1:30 pm **Lunch AB Salon - Uncas Ballroom**

1:30 pm – 2:30 pm **General Session:**

Own The Outcome: Why Customer Success

Trumps All Else AB Salon - Uncas Ballroom

Fee maxing, automation, portfolio vs. departmental... Does any of it matter if your clients aren't getting the experience they came to you for? "Own The Outcome" is a mental model we will use to define the key promises your business needs to keep in order to

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win a customer for life. Come learn a decision-making framework you can pass on to your staff to quickly make key customer-facing decisions without having work constantly flow back up to the owner/manager. Help your staff take ownership of not just the client relationship, but the key client outcomes that you intend to rest your business success upon.

Speaker: *Jorden Muela, CEO, LeadSimple*

2:35 pm – 3:25 pm

Breakout Sessions:

4. The In-House Maintenance

Blueprint *C2 Salon - Uncas Ballroom*

A session focused on setting up the nuts and bolts of a maintenance and remodeling business that can consistently provide estimates without price gouging or losing your shorts in the process.

Speaker: *Michael Schraepfer, President, Heirloom Property Management*

5. The Art of Outsourcing *C1 Salon - Uncas Ballroom*

A panel discussion that includes all aspects of outsourcing. Get the full spectrum of what may be explored as you evaluate your operations and receive the right tools that can help you determine what to outsource and what to keep in-house.

Speakers: *Phil Owens, CEO, OnSight PROS; Kobi Bensimon, CEO, Showdigs; DD Lee, MPM® RMP®, Skyline Properties Group, Inc.; Kellie Tollifson, MPM® RMP®, Owner, T-Square Properties.*

6. How to Position Yourself as a Trusted Advisor and Increase Brokerage Revenue *AB Salon - Uncas Ballroom*

Become a trusted advisor and increase revenue today! You will walk away with actionable steps to implement in your business that will immediately increase your revenue through brokerage transactions. We will discuss incorporating the trusted advisor approach during your initial meeting with clients, implementing the correct messaging throughout the customer life cycle, how to train your team to effectively increase repeat and referral business, and how to never lose a deal again.

Speaker: *Jay Berube, Chief Growth Officer, HomeVault Property Management*

3:25 pm – 3:45 pm

Refreshment Break *Uncas Ballroom Foyer*

3:45 pm – 4:45 pm

General Session:

50-100% Annual Returns: Leveraging Your PM Business As Your #1 Investment Vehicle *AB Salon - Uncas Ballroom*

What would you consider to be a good return on your investments? 10%? 15%? 20%? Most property managers understand cap rates, but are either unaware of or are under utilizing the best investment opportunity available to them. So what if you could get annual returns between 50-100%, year after year? What if your

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VERY BEST investment opportunity was already at your disposal, under your control, and at your fingertips? Based on the analysis of REAL property management businesses, this presentation will show you how to leverage your property management business as your #1 investment vehicle.

You'll learn how to:

- Think like an investor when evaluating potential investments in your business.
- Discern between efficient uses of capital vs. cash flow drags.
- Forecast future returns based on your current trajectory.
- Quickly lever up or down in response to how the business is performing.

Speaker: Daniel Craig, CEO, ProfitCoach

4:45 pm – 6:45 pm **Virtual Exhibit Hall Hours**

TUESDAY, APRIL 20, 2021

7:30 am **Registration Open Uncas Ballroom Foyer**

8:00 am – 8:50 am **Partner Breakout Sessions**

1. The Triple Win: The Property Manager

that Property Love AB Salon - Uncas Ballroom

Property managers are in the expectations business. Triple Win will show how to set and exceed expectations to win hearts and win business. Why becoming known for a niche that you own is the surest strategy for success and we'll provide examples of how to do it. How property managers are finding unconventional ways of elevating service for residents and owners, while shortening staff to-do lists. What could change if every relationship in your business was impacted by higher levels of trust and connection? Hear real examples and actionable tactics that are turning a big idea into powerful results.

Speaker: Thad Tarkington, CEO, Second Nature

2. What Smart Property Managers Have Learned About

Smart Home Technology(Virtual/Zoom Only)

2020 was a difficult year for us all. Learn why property managers implemented smart home technology, how they funded it, and how it solved multiple operational issues for them.

Speaker: Jim Netska, Sales Leadership, PointCentral

**3. Tomorrow's Tech Today:
How to Prioritize Today's Tech
Adoption for Future Success..... C2 Salon - Uncas Ballroom**
Description to follow.
Speaker: Joe Easton, Channel Partner Account Manager,
Rent Manager

4. Catching Gen Z Renter Wave(Virtual/Zoom Only)
The oldest renters in Generation Z turn 25 in 2021. That's a significant marker, as it's a time many young people will be leaving the nest, renting apartments and advancing their careers. In fact, by the end of the decade, the number of Gen Z renters will grow to about 55 million. It's a swell that will affect property management in a big way, and your competition is already vying for their attention. Backed with valuable data from a recent national renter survey, this session will teach you how Gen Z is making waves in the rental industry. Plus, we'll get you suited up with some totally rad strategies to help you connect with these up-and-coming renters. Presented virtually.
Speaker: Mark Coverdale, Industry Principle, Yardi Breeze

**5. 2021 Rental Owner Trends:
How to Solve Customers' Pain Points &
Support Their Growth(Virtual/Zoom Only)**
Description to follow.
Speaker: Robin Young, Senior Manager of Market Research,
Buildium

**6. Setting Owner Expectations:
The Key to Growth and Success C1 Salon - Uncas Ballroom**
Description to follow.
Moderator: Barbara Kaplan – Senior Director, Propertyware

8:00 am – 9:00 am Continental Breakfast & Coffee Uncas Ballroom Foyer

**9:00 am – 10:00 am General Session:
Road to Recovery: The Rental Market Outlook
After COVID Vaccines AB Salon - Uncas Ballroom**
Zillow Senior Economist, Jeff Tucker, will present on the state of the residential rental market, laying out how property managers weathered the COVID storm and what risks and opportunities to look for in a post-vaccine world.
Speaker: Jeff Tucker, Senior Economist, Zillow

10:00 am – 10:30 am Refreshment Break Uncas Ballroom Foyer

10:30 am – 11:20 am Breakout Sessions:

7. How to Find Hundreds of “Hidden” Landlords Who Are Hungry for Property Managers (And Nobody Else is Marketing to Them!) AB Salon - Uncas Ballroom

Finding, farming, and filtering top quality leads using a simple, low-cost secret strategy that works in any city. Don't miss your opportunity to see LIVE on stage exactly how to do this little known technique in under 30 minutes.

Speaker: *Rhianna Campbell, CEO, Juniper Street Real Estate Services, LLC*

8. Go Big or Stay Small: Does Size Matter in Property Management? C2 Salon - Uncas Ballroom

There seems to be two schools of thought in the property management industry: manage fewer properties, maximize revenue and maintain a higher quality of life or grow your business, add multiple revenue streams, and build a regional business. This seminar will be in “point/counterpoint” format with Todd Ortscheid defending the “stay small” business model, and Brian Birdy, MPM® RMP®, promoting a growth strategy.

Speakers: *Todd Ortscheid, Chairman, President & CEO, GTL Real Estate; Brian Birdy, MPM® RMP®, CEO, PMI Birdy Properties, LLC, CRMC®*

9. Designing Sales Experiences That Lead to Profitable Growth C1 Salon - Uncas Ballroom

Selling as a trusted advisor in your market not only makes you the most attractive choice, it helps you secure more of the right clients at profitable rates. Join us for a workshop where you can design the ultimate sales experience to stand out in your marketplace and win profitable relationships with predictable reliability.

Speaker: *Jeremy Pound, CEO, RentScale*

**11:20 am – 1:00 pm Vendor Expo Opens D Salon - Uncas Ballroom
Lunch AB Salon - Uncas Ballroom**

**1:00 pm – 2:00 pm General Session:
Success Through a Self-Managing Team AB Salon - Uncas Ballroom**

How to develop a self-managing team that truly positions you as a business owner and not a business operator. Key tools covered include Accountability Charts, KPIs, Core Values, and Quarterly Goals.

Speaker: *Matt Tringali, Chief Strategy Officer, HomeVault Property Management*

2:05 pm – 2:55 pm

Breakout Sessions:

10. The Future of Property Management: Why It's

Essential to Embrace AI AB Salon - Uncas Ballroom

Artificial Intelligence (AI) and technology can be used to operate more effectively and efficiently. Join this session to learn more about AI, how it can benefit your business, as well as get a preview what property management could look like by the end of the decade.

Speakers: *Cat Allday, AppFolio*

11. What you Need to Know About the Real PPP (Protection, Pet Policy, and Profits) C1 Salon - Uncas Ballroom

In this session, we will dive into the real PPP. In the Post-COVID world, pet ownership and assistant animal requests are on the rise. We will discuss:

- 1.) How to PROTECT yourself in the ever-changing world of assistance animals;
- 2.) Review how to create an effective PET POLICY; and
- 3.) Discuss the opportunity of making a PROFIT with pets.

Speaker: *Brian Birdy, MPM® RMP®, CEO, PMI Birdy Properties, LLC, CRMC®*

12. Family Business and

Succession Planning C2 Salon - Uncas Ballroom

Description to follow.

Speakers: *Marc Cunningham, RMP®, President, Grace Property Management & Real Estate; Erin & Casey Ralston, Owners, Ralston Team Properties; and Sarah Laidler, RMP®, Broker/Owner, Accolade Property Management*

3:00 pm – 4:00 pm

Refreshment Break with Vendors D Salon - Uncas Ballroom

4:00 pm – 5:00 pm

Keynote Session:

5 Shark Points: Fundamentals for Success in

Business and Life AB Salon - Uncas Ballroom

Daymond John has been a phenomenally successful business person for over 25 years. Along his entrepreneurial journey, through his many successes as well as failures, he has learned a few things about getting the best out of business and life. He believes the keys to his success include establishing the right mindset and following a few fundamental principles, which he calls his five “S.H.A.R.K points.” Get ready! Daymond John is going to share his unique goal-setting and achievement strategies, which will empower audience members to make positive changes in every aspect of their lives.

Speaker: *Daymond John, Founder/CEO of FUBU, Presidential Ambassador for Global Entrepreneurship, Star of ABC's Shark Tank, and CEO of The Shark Group*

5:00 pm Daymond John VIP Q&A Session*C1 Salon - Uncas Ballroom
 *Ticketed Event
 Vendor Expo and Reception D Salon - Uncas Ballroom

WEDNESDAY, APRIL 21, 2021

7:30 am Registration Open Uncas Ballroom Foyer

7:30 am – 9:00 am Continental Breakfast in the Expo
 with Vendors D Salon - Uncas Ballroom

9:00 am – 10:00 am Roundtable Sessions Rooms TBD On-site
 Roundtable break-out sessions are intimate, moderated group discourses where attendees can discuss amongst peers a variety of topics important to the property management industry. The roundtables will take place over several rooms with multiple roundtables in each room. The table leader will briefly introduce the topic. Afterwards, the discussion becomes free form where the leader’s only obligation is to serve as a moderator. Leaders will keep things moving along by posing a few questions if conversations begin to stall. They will make sure that everyone at the table is getting a fair chance to speak and engage with others. The objective is not to necessarily solve a problem or come to a conclusion – it is to trade ideas/thoughts with other engaged individuals with similar interests and questions.

- Best Practices, Revenue StreamC1 Salon – Uncas Ballroom
- Maintenance, Tools/Apps/
 Software C2 Salon – Uncas Ballroom
- Marketing, Virtual Assistants, Workflow Automation
 and Time Management AB Salon – Uncas Ballroom

10:00 am – 10:30 am Refreshment Break with Vendors D Salon - Uncas Ballroom

10:30 am – 11:20 am Breakout Sessions:

13. Buy, Sell or Stay Put – How to Decide
 What’s Right for You C1 Salon - Uncas Ballroom
 Two industry veterans, with several acquisitions under their belts, share the top ten pitfalls to avoid when acquiring a book of business. They will also review the “math” behind an acquisition and show when they do and do not make sense. These are insights that can only be learned by doing, and Mike and Jock have turned away as many acquisitions as they’ve completed.
Speakers: Joseph Polverari, General Partner and Founder, PURE Group of Companies; Mike Catalano, CEO, Real Estate Connections

14. And So To The Future C2 Salon - Uncas Ballroom

2020 threw the industry into a tailspin. Like so many industries, property management was ill-prepared for a pandemic. In April 2020, Jo Oliveri formed a global property management task force, RISE TaskForce (Resilience: Innovation: Strategy: Empowerment), with representatives based in both the USA and Australia, from property management, banking, and technology industries. Together, they undertake research and key projects with specific elements of research on property management in the past, the current, and post COVID-19. Their goal was to design a property management business model of the future that could withstand challenges, both known and unknown. Get shared insight from the RISE TaskForce findings with a glimpse at the exciting future that awaits and learn how to bulletproof your business. Attendees will walk away with a more implementable business blueprint, complete with strategies to achieve long-lasting success through business scalability, sustainability, and serviceability.

Speaker: Jo-Anne Oliveri, Managing Director, ireviloution

15. Resident Benefits Package:

Maximizing Value and Profits AB Salon - Uncas Ballroom

In this panel, we will help you identify the true cost of services you're already providing, learn about others that add value to your business and residents, and cover best practices for a seamless rollout.

Speakers: Bob Hansen, Head of Sales, Second Nature;
Todd Ortscheid, Chairman, President & CEO, GTL Real Estate
Deb Newell, MPM® RMP®, Real-Time Consulting Services

11:20 am – 12:30 pm Lunch with Vendors D Salon - Uncas Ballroom

(Expo closes after lunch)

12:30 pm – 1:30 pm General Session:

The Leviathan – How the Creeping Power of the Administrative State

Affects Property Rights AB Salon - Uncas Ballroom

Protecting property rights is simply not a matter of stopping bad laws or enacting good ones. As we have seen with the CDC Eviction Moratorium, when the administrative state takes on unchecked powers, the results for property owners can be disastrous. In this session, the speakers will discuss this issue, how it affects you, and how to help make it stop.

Speakers: Caleb Kruckenberg, Litigation Counsel, New Civil Liberties Alliance, and John Bradford, MPM® RMP®, Owner & Firm Principal, Park Avenue Properties, LLC and North Carolina House Member

1:35 pm – 2:25 pm

Breakout Sessions:

16. Value Add Real Estate Investing as a

Property Manager AB Salon - Uncas Ballroom

Description to follow.

Speakers: Chris Shepard, Uptown Properties LLC

17. Business Process

Re-Design Workshop C1 Salon - Uncas Ballroom

In this workshop, we'll review a framework for identifying the primary constraint in your business, whether that's X, Y or Z. Then, we will divide into groups to workshop about the constraint and the key processes related to it. Each group will receive handouts related to the specific process they're working to optimize. At the end, a representative from each group will present the top optimizations they plan to make to this process in the coming months.

Speaker: Chris Berkompas, CTO, LeadSimple

18. Trust Fund Segregation C2 Salon - Uncas Ballroom

This session will provide attendees a better understanding of the different levels of segregation that exist within trust funds and the resulting responsibilities that a property manager has. For example, we all know that co-mingling with business funds is prohibited, but we also need to understand separation of deposit funds and other owner funds and why this type of separation is important both from a legal compliance and fiduciary responsibility point of view.

Speaker: Louw Liebenberg, CEO, PayProp

2:25 pm – 2:35 pm

Refreshment Break Uncas Ballroom Foyer

2:35 pm – 3:35 pm

Closing Keynote Session:

Passion on Purpose: Turning Corporate Culture

Into a Competitive Advantage AB Salon - Uncas Ballroom

This keynote reviews how to cultivate a high-engagement, high-performance work culture. As we prepare for the next growth cycle in business, leaders need to understand the needs and expectations of the modern workforce. Ryan pushes back on conventional thinking with new research and case studies from category-leading companies that succeed at maximizing human potential and elevating performance.

To win in today's market, you need a healthy organization: tuned-in employees, authentic leadership, open communication, and trust. Leaders are called to cultivate the kind of workplace where people come first and performance and profit follow. Most organizations leave too many opportunities on the table and waste a huge amount of their people's potential. This keynote offers practical advice to help you reverse that trend. After this keynote,

(Continued next page.)

audiences and organizations will understand what it takes to elevate engagement, unleash human potential, and compete to win in the new world of work.

Learning Objectives:

- Embrace change in the new economy.
- Learn from global workforce trends and forecasting from our research portfolio.
- Build high-trust, high-value relationships.
- Connect employees to a shared vision and set of values.
- Effectively use emerging technology to improve communication, culture and work life.

Speaker: *Ryan Estis*

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BROKER/OWNER Conference & Expo

April 19-21, 2021

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Uncasville, Connecticut**

*Note: There are
(45) spaces with
(1) 8' x 10' exhibit space,
(1) skirted table, and
(2) chairs.*

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Rently
8

Second Nature
10

Entrance

