


# Creating Systems and Streamlining the Office

**Presenters**

- David Holt, MPM®, RMP®
- Robert Machado, MPM®, RMP®
- Jean Storms, MPM®, RMP®



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# Systems for Small Property Management Companies

Jean Storms, MPM®, RMP®

*A system is a group of related parts that move or work together...*

*All property management companies need effective systems...*

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Small Management Companies, continued

- Don't think "small"
  - Think professional
  - Think organized
  - Think efficient
  - Think systems
- Property Management systems
  - bring order
  - reduce fires
  - Increase profits



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## Systems require...

- Behavioral management
- Basic organization
- Time management
- Effective documentation
- Necessary tools
- Educated team
  - Even a one-man office has a team!



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## Systems evolve from

- Categories
  - Categories often interact together
  - i.e. Owners, Tenants, Personnel, Vendors, etc.
- Cycles
  - Within each category there are different cycles
  - i.e. example on the next slide - the basic tenant cycle - from initial contact until the end of tenancy
  - cycles generally involve more than one system

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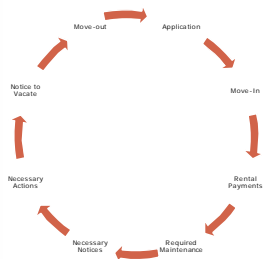
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## Example -Basic Tenant Cycle



*This cycle requires numerous systems to maintain organization*

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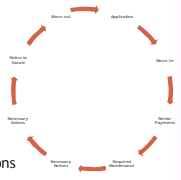
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**Below are a few of the systems necessary within the basic tenant cycle**

- Vacancy marketing system
- Application system
- Move in system
- Rental payment system
- Maintenance systems
  - Ordinary
  - Emergency
- Tenancy systems
  - Various notices
  - Problems/necessary actions
  - Legal actions
- Move out system
- Security deposit system



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**By charting cycles**

- You identify problems with within your existing systems
- You determine what additional systems you need
- You recognize the documentation, tools, support, and education you need
- You create company organization
- You increase company profits



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**Systems  
Medium PM Companies**

*David Holt, MPM®, RMP® CPM  
R.P. Management*

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## Obstacles to Success

- Lack of Systems
  - Ordinary vs. extraordinary
  - To make more \$\$\$ you have to work more hours
- OR
- Increase the revenue sources
- OR
- Maximize your time through systems

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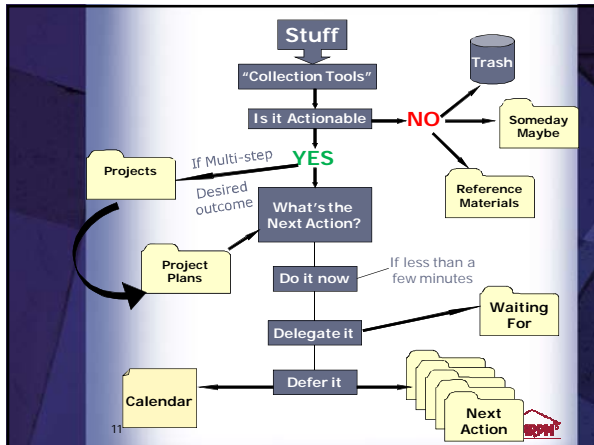
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## Property Management Systems

- Owner Services
  - Lead Generation (marketing)
  - Lead Conversion
  - Expectation Management
  - Sales (optional)
- Tenant Services
  - Lead Generation
  - Lead Conversion
  - Expectation Management
  - Sales (optional)
- Reference Info
  - Company P&P
  - Property Folders
  - Time Management Forms

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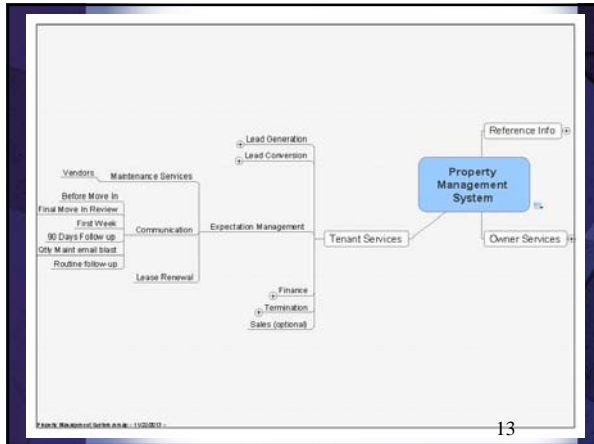
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## Tenant Expectation Management

- A. Maintenance
- B. Money
- C. Lease Renewal
- D. Termination

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## Systems

### Large PM Companies

*Robert Machado, MPM®, RMP® CPM*

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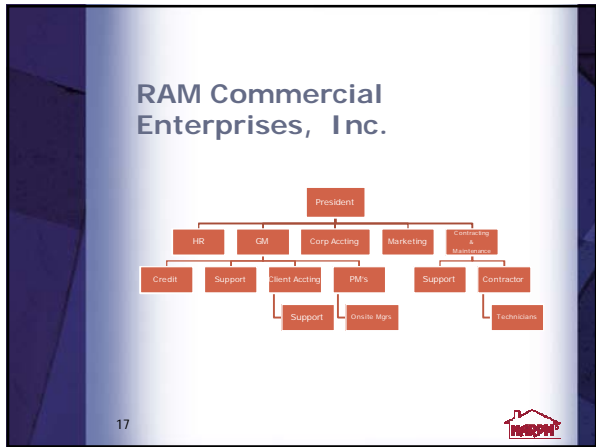
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- ### RAM Commercial Enterprises, Inc.
- Policy and Procedures
    - Personnel
      - Job Descriptions
      - Hiring
      - Tracking and Pay

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## RAM Commercial Enterprises, Inc.

- Policy and Procedures
  - Owner Relations
  - Renting
  - Maintenance
  - Rent Collections
  - Notices and Move Outs
  - Vacancy Renovations
  - Logs and Inspections
  - Resident Relations
  - Marketing and Account Management
  - Accounting

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## RAM Commercial Enterprises, Inc.

- Key Checklists and Controlling Calendars
  - New Accounts
  - Application and Move In
  - Unlawful Detainer
  - Deposit Refund
  - Closeout

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## RAM Commercial Enterprises, Inc.

- Key Checklists and Controlling Calendars
  - Accounting Calendar
  - Property Manager Calendar
  - PM Month End Compensation Checklist

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