



THE LANDLORDSOURCE
STOP THE FIRES, A PROPERTY MANAGEMENT CHECKLIST SYSTEM

OUTLINE, FORMS, AND EXCERPTS

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Product goal:

The Property Management Checklist System, Stop the Fires is more than just a lot of checklists to litter the office. It is a system to check the office organization and then track work consistently and efficiently using checklists. By creating an organizational system, you can determine where you need to add, improve, or even delete systems or documents to stop the fires.

Included with the product:

The 49 checklists are in three categories as follows:

1. 8 Checklists to test office organization
2. 25 Specific property management checklists
3. 16 General office checklists

This document contains:

- General outline of the *Stop the Fires Organizational Manual*
- List of customizable checklists
- Sample text and sample checklists
- Product Instruction Information

GENERAL OUTLINE
STOP THE FIRES MANUAL

Introduction

List of checklists

The checklist system

Checklist content

Stop the fires product goal

Store documents wisely

Create a new file folder

Backup

Using tables = professional checklists

LandlordSource checklists

The importance of tables

Key table tips

Practice on the sample checklists

The checklist FAQs

Why use checklists

Why do I have to use so many checklists?
Who needs to use checklists?
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 this product?
Where do I start?
How do checklists eliminate more paperwork and work?
How can I use checklists electronically instead of paper?

When do checklists create too much control and create negativity?

Use Checklists Effectively

- Use electronic checklists when possible
- Initiate routing systems
- Assign the right personnel
- Forms definitions

Frequently asked checklist questions

Step 1 - the 8-checklist test (the first 8 checklists) for the office

- What is the 8-checklist test?
- Why use the 8-checklist test?
- Do NOT be discouraged
- Don't reinvent the wheel

Step 2 - Property Management Checklists

- Checklists 9-33

Step 3 - Office Organization Checklists

- Checklists 34-49

Reviewing Checklists

- Do your checklists work?
- What NOT to do with checklists

The Seven (7) Keys to Organizing a Property Management Office

- 1 - Competent personnel
- 2 - Professional forms and manuals
- 3 - Interactive documents
- 4 - Effective checklists
- 5 - Organized files - paper and electronic
- 6 - Personnel training
- 7 - Consistent reviews

The Five (5) Steps to Achieving the Seven Keys

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

CUSTOMIZABLE CHECKLISTS INCLUDED IN THE PRODUCT

The following checklists are available in this product:

The 8-Checklist Test

1. Business Overview Checklist
2. Property Management Overview Checklist
3. Property Management Compliance Checklist
4. Personnel Overview Checklist
5. Owner Organization Checklist
6. Tenant Organization Checklist
7. Vendor Organization Checklist
8. Communication Checklist

Property Management Checklists

9. Presentation Checklist
10. Management Inquiry Checklist
11. Management Package Checklist
12. Management Appointment Follow-up Checklist
13. New Client/Owner Checklist
14. Lease Only Checklist
15. New Property/Tenant Checklist
16. New Property Maintenance Checklist
17. Tenant Application Checklist
18. Tenant Move In Checklist
19. Add/Remove Tenant
20. Add/Remove Pet Checklist
21. Drive-by checklist
22. Lead-Based Paint Repair Checklist
23. Tenant Violation Checklist
24. Annual Property Survey Checklist
25. Mold Problem Checklist
26. Hoarding Checklist
27. Fair Housing Complaint Checklist
28. Renew Lease/Rental Agreement Checklist
29. Unlawful Detainer/Eviction Checklist
30. Tenant Move Out Checklist
31. Security Deposit Refund Checklist
32. Client Termination Checklist
33. Property Termination Checklist

Office Organization Checklists

34. Personnel Checklist
35. Vendor Checklist
36. Supply List Checklist
37. Equipment Review Checklist
38. Software Records
39. Trust Account Audit Checklist
40. Insurance Review Checklist
41. Brand Identity Checklist
42. Required Poster Checklist
43. PM Office Cleanup Checklist
44. Year-end Checklist
45. Office Vacation Checklist
46. Personal Vacation Checklist
47. Six Word Review
48. Update Document Checklist
49. Safety Analysis Checklist

COMPANY OVERVIEW CHECKLIST

	Yes	No	N/A	In Progress/%	Needs Revision	List Priority (High, Med, Low)
Is there an organized company business plan in place?						
Is there a company mission statement?						
Is there an organized marketing plan in place?						
Is there an office company logo?						
Is the company logo in an electronic format?						
Does the company display the logo on all company documents and advertising or marketing?						
Does the company strive to display a uniform look or brand identity on all company materials and advertising with the logo and color?						
What market share does the company have in the target area for leasing/rentals?						
If there are also sales, what market share does the company have in the target area for sales?						
Does the company have a website?						
Is the website current?						
Does the website promote business?						
Are there furniture and equipment records for the business?						
Are there software records for the business?						
Are there hardware records for the business?						
Is there a Safety Policy for the office?						
Is there a written Emergency/Disaster System in place for the office that includes the Broker/Owner?						
Does the company do Real Estate Sales?						
If there are Real Estate Sales, is there a Policy & Procedures Manual for Real Estate Sales?						

COMPANY FORMS/DOCUMENTS

	Yes	No	N/A	In Progress/%	Needs Revision	List Priority (High, Med, Low)
Business Plan / Marketing Plan						
Furniture & Equipment inventory checklist						
Software inventory checklist						
Hardware inventory checklist						
Software inventory checklist						
Policy and Procedures for Real Estate Sales						

This is an electronic checklist and so it is "protected" (refer to the Product Instructions if necessary). "Unprotect" the document to change, then protect if used as electronic document. It can be unprotected, printed, and handwritten. Delete this text when finished.

ADD/REMOVE TENANT CHECKLIST

Add Tenant Remove Tenant

Property address			
Owner account name			
Property manager			
General Tenant Information			
Home Telephone	Rent \$	S. Dep.	\$
Name, Tenant 1	Work #	Cell #	
Name, Tenant 2	Work #	Cell #	
Name, Tenant 3	Work #	Cell #	
Name, Tenant 4	Work #	Cell #	
Name, Tenant 5	Work #	Cell #	
# Residents under 18	Pets	Type of Pets	
<input type="checkbox"/> Add Tenant			
New Tenant Name (s)			
<input type="checkbox"/>	Application received on		
<input type="checkbox"/>	Application processed on	<input type="checkbox"/>	Approved <input type="checkbox"/> Denied
<input type="checkbox"/>	Owner notified	<input type="checkbox"/>	Approved <input type="checkbox"/> Denied
<input type="checkbox"/>	Add Tenant Addendum prepared	<input type="checkbox"/> Addendum signed by all tenants and prop mgr	
<input type="checkbox"/>	New lease prepared	<input type="checkbox"/> New lease signed by all tenants and prop mgr	
<input type="checkbox"/>	Copy of addendum or lease addendums and Tenant Handbook given to appropriate parties		
<input type="checkbox"/> Remove Tenant			
Tenant Name			
<input type="checkbox"/>	30-day Notice received from resident	<input type="checkbox"/>	Eligible for 30-day <input type="checkbox"/> Non-eligible
<input type="checkbox"/>	30-day partial notice letter sent	Move out date on	
<input type="checkbox"/>	Owner notified <input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> n/a		
<input type="checkbox"/>	Follow-up on partial tenant move out on	<input type="checkbox"/> Tenant move out verified	
Management			
<input type="checkbox"/>	Filed Reviewed		

SAMPLE

SAMPLE

SAMPLE

VENDOR CHECKLIST

Company Name		Business #	
Company Owner		Fax #	
Business Type		Mobile #	
Address		Pager #	
City		Home #	
Zip		Emergency #	
		Other #	
		Other #	
Vendor Office contact:			
Incorporated	<input type="checkbox"/> Yes <input type="checkbox"/> No		
SSS #			
Tax ID #			
Interview date		Start date	

General Information, Insurance & Licensing			
Date Application Received			
Date Of Credit/Criminal Report			
Date Vendor Agreement			
Contractor's License Required	<input type="checkbox"/> Yes <input type="checkbox"/> No		
Contractor's License Number			
Company Vendor Guide Issued	<input type="checkbox"/> Yes <input type="checkbox"/> No		
W-9 Received	<input type="checkbox"/> Yes <input type="checkbox"/> No		
Bond Required	<input type="checkbox"/> Yes <input type="checkbox"/> No		
Copy Of Bond Received	<input type="checkbox"/> Yes <input type="checkbox"/> No	Contractor's Phone	
Workman's Comp Required	<input type="checkbox"/> Yes <input type="checkbox"/> No	Company Phone	
Copy Of Workman's' Comp Received	<input type="checkbox"/> Yes <input type="checkbox"/> No		
Workman's Comp Renewal Date			
Contractor's License Required	<input type="checkbox"/> Yes <input type="checkbox"/> No		
Copy Of Contractor's License Received	<input type="checkbox"/> Yes <input type="checkbox"/> No		

Termination of vendor	
Date	
Reason	
Last check date	
Legal action	<input type="checkbox"/> Yes <input type="checkbox"/> No
Legal action settled	<input type="checkbox"/> Yes <input type="checkbox"/> No
File closed	<input type="checkbox"/>

EXCERPT FROM STOP THE FIRES MANUAL

THE CHECKLIST FAQs

Why use checklists?

The real estate/property management industry is loaded with paperwork and you may wonder why you should create even more paper using checklists.

Here are seven great reasons

1. Checklists create a tracking system, which eliminates many unnecessary problems and prevents the fires from erupting.
2. Checklists improve office performance, which in turn reduces office stress.
3. Checklists can track personnel/employee performance – if there is a good checklist system and there are still problems, you can pinpoint where to take corrective action with personnel.
4. Checklists do not necessarily have to create more paper or take more time – when you eliminate crisis management, there is LESS paper used and LESS time wasted.
5. Checklists do not always have to be on paper – there are ways to use many checklists electronically. When you access the checklists, many are in a protected format so you can print them on your desktop and fill them in directly on your computer.
6. Checklists increase risk management. This is very important when a Department of Real Estate, Real Estate Commission, Internal Revenue Service, Fair Housing, or any other government agency rolls in the door. There is less work to do because you know your files, documents, and systems are in good order.
7. Checklists create an organized atmosphere, reflecting professional property management, which, in turn, improves all client relationships, whether it is an owner, a tenant, a vendor, or an applicant.

You could probably list many other reasons to use checklists. What is important is to make them work for you and your company. By using the LandlordSource checklists, you can easily tailor them to meet your office requirements.

Why do I have to have so many checklists?

The answer is – you do NOT have to have all of these checklists – you may only use a few. You may use some every day, while others could only be necessary once a year. Some of the checklists enclosed may be not be necessary. Then again, you may use them all. They are here for you to review and implement when necessary.

Select what is most important and start there.



**Checklists can
reduce the fires...**

