



THE LANDLORDSOURCE
**ROADMAP TO ORGANIZING
PROFESSIONAL PROPERTY MANAGEMENT**
OUTLINE, EXCERPTS, AND FORMS DESCRIPTIONS

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Sometimes directions are confusing or unclear. It is important to understand where the journey of this roadmap (product) is going.

What is the purpose of this product?

Most companies benefit from using common sense organizational practices to avoid problems or lost business plus systems that are inherent to their particular industry. Property Management is an industry that requires a lot of organization to operate successfully and avoid high risk.

The problem is that many business owners do not stop to look at the whole picture of what can improve their organization, which in turn will improve their company image and bottom line. The focus of *A Roadmap to Organizing Professional Property Management* is to provide that view to business owners and property managers.

This product will cover information to create, establish, and maintain organization every day in the real estate/property management business.

What is NOT the intention of this product?

This product does NOT give you a model for setting up the physical or virtual office. It does not address state licensing, building procurement, creating a business plan, procuring an accounting program, devising a marketing plan, etc.

What IS included with this product?

PDF Manual - "A Roadmap to Organizing Professional Property Management"

This is not a customizable manual because its entire purpose is to share information and assist you with organizing your property management business. However, the many forms and spreadsheets included ARE completely customizable

24 Microsoft Word® forms

The Microsoft Word® forms are completely customizable for completing tasks or exercises in planning or updating your organization. **Please note - the forms are in a docx format.** If you have earlier versions than 2007, you will have to download the conversion tool from Microsoft.com.

2 PDF Informational Forms + PDF Instructions

Two documents are in a PDF format to help you with creating the forms. In addition, there are 26+ pages of PDF Instructions included.

How can you use this product?

There is more than one way to use this product. The intent is to help you set up or improve the organization of your property management company, large or small. The analogy used is the concept of planning a road trip (creating organization) and reaching a destination (a goal). Read on to see how you can use the information and materials.

- ✓ To review the success or failures of your current business
Here is a thought - how do you know where you are if you do not know where you have been? If you do not take the time to investigate the successes and/or failures of your existing business, how will you know what needs to change, why there is little or no growth, why there may be losses, or why there is chaos and mayhem? Therefore, it pays to review your past and current operation if you want to figure out future goals and systems.
- ✓ To create systems that will improve performance of your existing company
Why keep using something you know is not working? Do you continually use the same form with poor information that does not work effectively? Do you ignore your outdated policy and procedures manual and it sits unused? Do you keep using the same vendor who is doing sloppy work? Just ask yourself “why?” When you are reviewing your successes and failures, ferret out the practices that are keeping you, your team, and your company from moving on and reaching your destinations (goals).
- ✓ To educate/update your team or create a new one
It’s great if reading this product helps you personally increase your organization, efficiency, and more. It IS a waste if you have a team available and you do not share the information with them. We often assume too much when we work with people, thinking that they should automatically know certain premises when it comes to service, commitment, good work practices, and more.

Do you have office meetings or training sessions? If you do, are they productive? Take sections of this manual and share with your personnel. Ask for their input. Use this product to help you build a great team.

The terminology

As stated before, this product is making a comparison of organizing professional property management to taking a trip using a roadmap. There may be several trips; therefore, you may need to utilize several roadmaps (systems) to get to your destinations (goals). The chapters in this manual use the following terminology:

1. **Key points of the journey** - the four areas that are necessary to achieving professional property management organization
2. **Determine your starting point** - an existing property management company or starting a new property management company

3. **Choose your destination** - the goals you want to reach for your organization
4. **Understand the terrain** - 1st key area - understanding what affects organization
5. **Recognize basic rules of the road** - 2nd key area - four basic rules of organization
6. **Organize the time on the road** - 3rd key area - creating effective daily organization
7. **Map your destinations** - 4th key area - how to implement and create great systems to achieve your goals
8. **Choose the right transportation** - determining the tools you need, such as forms, agreements, manuals, checklists, personnel, and more to create organization
9. **Invest in your journey** - planning your expenditures to reach your destinations
10. **Make the trip** - complete your planning and review your organization
11. **Use the tools of the road**- the various forms and spreadsheets that come with this product

Overlap of information

As you read this manual, you will probably see some overlap or repetition of some information. There is no intention of redundancy. It is sometimes necessary to cover some of the material again because it relates to more than one point.

Watch for the “signs”

As you take the journey (using this product), look out for the various road signs (for example, the stop sign to your right) in this manual. They point out the forms/information to use or exercises that you and/or your team can do to assist with your organization.



There will also be many organizational tips along the way - just watch for this sign.



Microsoft Word® Forms Included with this product

1. Six Word Review	Use this form to put together six words that will lead you to your main company goal and review your mission statement.
2. Company Goal Map	Chart out your company goal/mission. There are two different charts to use.
3. Evaluating the Team	Lay out your entire team on paper. This will help you as you map out your goals and systems.
4. Analyzing Organization	Analyze the organization in your office; have each member of the team fill out this form.
5. Vacation Planner	To go on a vacation, you have to plan it. Use this form and plan your trip carefully
6. Office Vacation Checklist	When you leave in vacation, this form will help you complete important tasks before leaving.
7. File Plan Mapping	It is important to be able to find your files, whether they are paper or electronic. Planning is a key.
8. Backup System Checklist	Backing up your data is critical - use this form to see if you are doing enough.
9. Temporary Emergency System Checklist	When you do have a computer system go down, backups are necessary. However, you often need a temporary system in place to function until you properly restore backups.
10. To-Do List	Customize this to do list to your organization.
11. Return To-Do List	When you leave on vacation, you want to leave everything completed but sometimes it is not possible - prepare this so you are ready when you return.
12. Email Netiquette Checklist	Email is a great tool but all too often people do not use it in a professional manner. Review this checklist and see how your emails compare.
13. Email Agreement	You should always have an email agreement with your personnel so that they know what your expectations are.
14. Computer Time Savers	Here are useful tips to increase your organization.
15. Microsoft Word® Tools	Most people do not use the power of Microsoft Word®. Add to your repertoire of keystrokes to improve your organization.
16. Property Management Cycles	There are many cycles in the property management business. Laying out a cycle gives insight to necessary systems.

17. System Checklist	This form will help you look at systems that you have, ones that need revision, and possibly ones that you need.
18. System Map 1	Use this chart to map out a system
19. System Map 2	This is a second chart for mapping out a system
20. Forms Review	Periodically, you should review all your forms to see if they need revision or if you are missing forms that would improve your organization.
21. Checklist Review	Putting checklists in place will make your systems work. Periodically review your checklists and update them as needed.
22. Manual Review	Manuals are big keys to organizing professional property management - review what you have; add more if you need them.
23. The Wheel	You do not always have time to create tools for organizing professional property management. This form has information on where to look for them.
24. Reviewing the Trip	It is always important to stop and review a system, particularly when it is new. Meet with your team and use this form.

❖ **PDF Forms**

1. Creating Smart Graphics	This information is from Microsoft.com and details how to you the Smart Graphics feature in the more recent versions of Microsoft Word®.
2. Safer Password Tips	It is important to protect your information. This gives you some tips on setting up good passwords.

❖ #17 - CREATE A SYSTEM MAP 1

Change this map example for revising an application process to one that you want to change or add
Read PDF 1, Creating Smart Graphics if you need help or consult

