Property Manager Training Checklist

	Date	√
Property Manager		
Who is this Property Manager's Buddy for the next 12 months?		
Property Manager to e-mail a "hello" to the rest of their team.		
Has this Property Manager signed their Employment Agreement?		
Has this Property Manager Read the Procedures Manual before starting?		

Property Manager		
First Day (and Prior to)	**Date**	**√**
Touch base, start time, where to park etc.		
Welcome to office, introductions etc.		
Office tour		
Business values, mission and goals		
Who's who – introduction to other staff and their jobs		
Work through job description, clarify anything.		
Performance expectations and review process		
Logins and passwords to all relevant systems		
Where to find stationary, forms etc		
Policies and procedures review – 1 full day required		
For office-bound property managers - health and safety regulations		
What to do if there are any problems or any questions		
Key Audits		
KPI Review		
Update Website with details		
Action when a maintenance issue occurs		
Raising a work order		

Communicating with tradesmen / tenant & owner		
Creating vacancy lists		
Processing applications		
Processing tenant checks		
Listing properties on TradeMe, re.co.nz and other sites		
Listing properties on website		
Using IRE – training and setup required		
Console Access – 5 hours training required or Palace, Rockend, Property Tree		
Inbox setup		
Signature setup		
Arrange business cards		
Arranging and completing a routine		
Doing an open inspection		
Stationary account / rules		
Office keys if applicable		
Reception coverage if applicable		
Handing keys out procedure		
Setting up hard copy files		
For rent signs – discuss use of		
How to do a decent property description		
How to take photos		
How to do a video		
How to do an owner update		
Completing a tenant signup		
What months to fix lease's term		
Vacating tenant process		
Holding deposit amounts/process – calculator popped on your desktop		

Bonds process/procedure		
New business – generating leads		
Management Agreement –understand		
Phones – how to divert if applicable		
How to use "For Rent" Signs		
Use of YouTube		
E-mail redirection when on lease		
Review Code of Ethics Procedures Site		
FAQ read and understood		
Contact WINZ – Register		
Register Blog Page		
Register with TINZ, IRE, Real Insure, Fast Connect, other		
Uniform organised		
Car insurance?		
Procedures site login and 1-week review of		

New Business Development		
	Date	**√**
Review all new business actions loaded on procedures site and then action each one with Property Manager Buddy		
Revision Management Agreement, Guarantee Certificate, Landlord Insurance		
Create Listing Folder		
Revision of Property Enquiry Form and use of		

IT Section		
New laptop setup / rebuild checklist	**Date**	**√**
User / Property Manager		

Configure OS		
Install Software (as below)		
New Users		
RDP User		
PM software account setup		
Email Account		
Setup email settings		
Setup paths to Templates		
Setup email locally and on server		
Software to install		
Office 365		
Remote Desktop Client		
Skype		
Other		
Rebuild/Re-install		
Backup any existing files		
Re-install OS		
Configure OS		
Install Software (as below)		
Restore existing files		
Website Links		
dbh.govt.nz		
fastconnect.co.nz		
reinz.co.nz		
rlinz.co.nz		
Other		