

Administration Team knowledge, skills & experience workbook

How to use this workbook



This workbook has been designed to support your career in property management and is a companion to the Building Blocks book and the Career Passport. More information about these publications can be found at apmasphere.com

This workbook has three parts:

1. Knowledge transcript
2. Skills register
3. Experience log

Each of these parts has 10 competency areas, and each competency area has 10 competency modules. In total, there are 300 competency modules defined in this workbook.

There is a different workbook for each of the four teams in a property management business:

- the **leadership** team
- the **property management** team
- the **administration** team
- the **business development** team

Within each team, we have identified which of the competency modules are required for each of the three roles within the team. This is best explained by reviewing the Career Passport – a copy of which is found on the next page.

KNOWLEDGE TRANSCRIPT The knowledge transcript lists out competency modules that test for knowledge of the core concepts in property management.

You can complete a knowledge module by nominating that you have passed the relevant knowledge test and having your principal, supervisor or trainer certify that you have done so.

SKILLS REGISTER The skills register lists out competency modules that test for your ability to take property management and other concepts and achieve a successful outcome for your stakeholders.

You can complete a skills module by nominating that you have demonstrated that particular skill on two separate occasions either in the practice of your job or by participating in a case study, and having your principal, supervisor or trainer certify that you have done so.

EXPERIENCE LOG The experience log lists out competency modules that reflect experience in performing certain tasks in property management.

You can complete a experience module by completing the required tasks for that module, filling in the accompanying experience log and having your principal or supervisor certify that you have done those things.

FOR MORE INFORMATION Apmasphere offers a comprehensive learning & development program that is designed to support you building out the required competencies for your role.

For more information on any of these topics, please visit apmasphere.com.

Administration Team Career Passport



Driving productivity

Productivity is the force that allows the agency to do more for its clients, create more value for stakeholders and give more opportunity to those working in the team.



Maintaining the policies & procedures

Policies & procedures are the foundation of any property management team. Policies define the services offered by the agency and procedures outline how the agency will implement them.



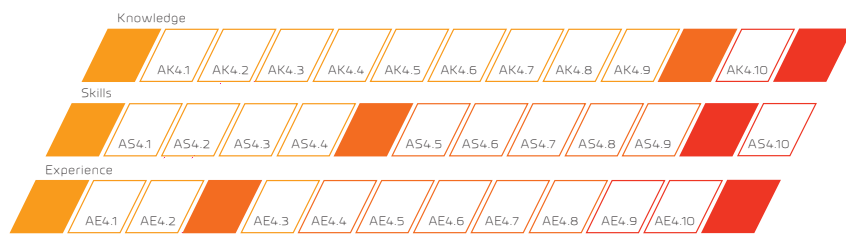
Quality control

Quality is one area where an agency can stand apart from the crowd and deliver sustained value for all stakeholders, but requires energy and discipline.



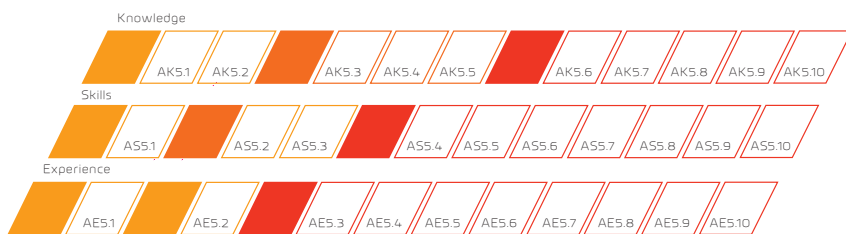
Communication standards

Like any profession we are in the communication business. Being proactive in managing and delivering on expectations is at the heart of any relationship.



Trust accounting

Trust accounting is a collection of specialty tasks that manage the flow of funds between the different stakeholders. There are strict legal requirements to be mastered.



Managing tradespeople

Having reliable and trustworthy tradespeople working for your agency can be a powerful resource. Keeping up-to-date with their licenses, insurance details & service level is an ongoing task.



Risk management

Responsibly identifying and managing risks within the agency and with clients is an increasingly important skill – crucial to any long term viability of the business.



Working in a team

Like in any business, a PM team must work to build a cohesive and functioning team. Ultimately, being an agency where the best people want to work is a strategic advantage.



Insights and reporting

Tracking, measuring and reporting can provide valuable insight into an agency's weaknesses. Findings can aid in the development of new processes for future improvement and success.

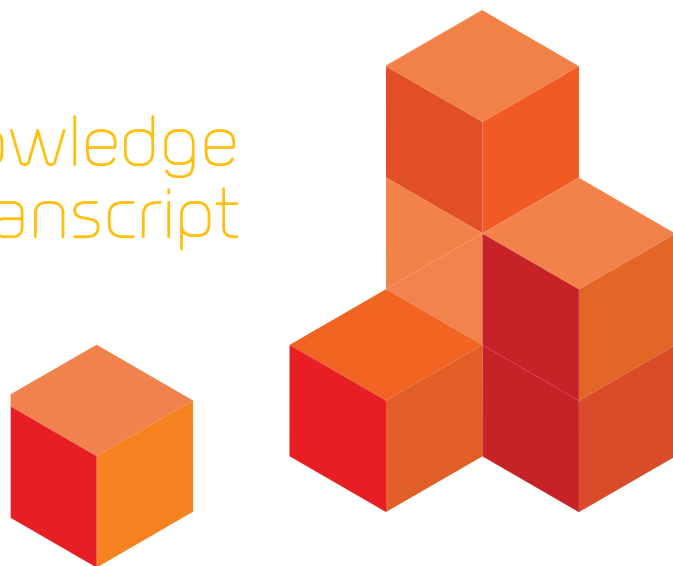


Property Management basics

Understanding the basic concepts of property management brings understanding to the needs of the business, the team and its stakeholders. Everyone in the team must be across these concepts.



Knowledge
transcript



1. Driving productivity

Productivity is the force that allows the agency to do more for its clients, create more value for stakeholders and give more opportunity to those working in the team.

AK1.1

The roles in an agency

You will be required to define the different roles in a property management business, their main functions and how they relate to each other

Date _____ Verified _____

AK1.6

The importance of time management

You will be required to demonstrate an understanding of basic time management principles and the role they play in managing work across the team

Date _____ Verified _____

AK1.2

What everyone is working on

You will be required to demonstrate an understanding of what each person in the agency is working on and how you can get a better understanding of each person's workload

Date _____ Verified _____

AK1.7

The importance of risk management

You will be required to demonstrate a firm understanding of the main risks in a property management business and work practices you can put in place to identify, track and manage those risks

Date _____ Verified _____

AK1.3

The ebbs and flows in property management

You will be required to understand the different work that flows through the team, how to use quiet times to get through work and how to identify the specific tasks that will likely cause the team to be disrupted

Date _____ Verified _____

AK1.8

The importance of dependability

You will be required to understand the principles of dependability and the advantages they bring in a team environment

Date _____ Verified _____

AK1.4

Policies and procedures

You will be required to demonstrate proficiency in the agency's policies and procedures and how they can be used to drive efficiency and alignment across the whole team

Date _____ Verified _____

AK1.9

Excellence in everything we do

You will be required to demonstrate knowledge of the core concepts that define excellence in property management and how to embed those into every aspect of the agency

Date _____ Verified _____

AK1.5

How property managers can be supported

You will be required to demonstrate an understanding of how you can offer support to members of the property management team to allow them to focus on their core responsibilities

Date _____ Verified _____

AK1.10

Keep up to date with new technology

You will be required to show familiarity with the main sources of potential technological advantages in a property management team and the current trends and innovations that you can bring into the agency

Date _____ Verified _____

2. Maintaining the Policies & Procedures

Policies & procedures are the foundation of any property management team. Policies define the services offered by the agency and procedures outline how the agency will implement them.

AK2.1

Why policies and procedures are important

You will be required to know why policies and procedures are used in an agency to drive efficiencies, manage risk and drive quality across the agency and the common issues with them

Date _____ Verified _____

AK2.2

The legal framework for our industry

You will be required to demonstrate proficiency across all the significant bodies of legislation and regulations that affect the practice of property management

Date _____ Verified _____

AK2.3

The tasks in property management

You will be required to understand the purpose and flow of all the core tasks in property management and the common issues that arise in each along with the main documents that support the work

Date _____ Verified _____

AK2.4

The limits of 'purchased' policies and procedures

You will be required to demonstrate an understanding of the basic limitations of policies and procedures that have been developed as a generic product outside your agency

Date _____ Verified _____

AK2.5

One way vs. many ways

You will be required to demonstrate an understanding of the benefits of articulating 'one way' of doing things and aligning the team around a common set of practices

Date _____ Verified _____

AK2.6

Formality vs. usability

You will be required to demonstrate a familiarity with different philosophies for writing your policies and procedures and the basic principles that drive usability

Date _____ Verified _____

AK2.7

The limits of policies and procedures

You will be required to demonstrate an understanding of the design principles of a policies and procedures manual and the limits that any set of procedures operates under

Date _____ Verified _____

AK2.8

Improving your policies and procedures

You will be required to understand how you can identify deficiencies in your approach and how you can incrementally improve and release updates to your policies and procedures

Date _____ Verified _____

AK2.9

Outputs and outcomes

You will be required to know how to connect your policies and procedures to a broader context of achieving a set of desired goals for the agency and its clients

Date _____ Verified _____

AK2.10

Going beyond the checklist

You will be required to know how to implement work practices that empower the team to work beyond the policies and procedures to achieve great outcomes when appropriate

Date _____ Verified _____

3. Quality control

Quality is the one area that an agency can stand apart from the crowd and deliver sustained value for all stakeholders, but it requires energy and discipline.

AK3.1

The definition of quality

You will be required to understand the service standards and practices that define quality in property management and how to ensure you are recognised for that quality

Date _____ Verified _____

AK3.2

Professional presentation

You will be required to understand the importance of presenting your agency professionally to the community and the quality cues that the public will judge you on

Date _____ Verified _____

AK3.3

What low quality looks like and does

You will be required to demonstrate an understanding of how a quality property management business is perceived and the KPIs that can be used to measure that effect

Date _____ Verified _____

AK3.4

Customer first teams

You will be required to know the definition of being a customer first team, the main differences to an internally focused one, and the impact that has on the way the team operates

Date _____ Verified _____

AK3.5

The connection to your point of difference

You will be required to understand the impact your point of difference has on your definition of quality and how it drives prioritisation of your quality efforts

Date _____ Verified _____

AK3.6

Client facing innovation

You will be required to know the definition of client-facing innovation and the importance that this kind of innovation has on the perception of quality

Date _____ Verified _____

AK3.7

Client surveys

You will be required to understand how to design a client survey and the importance of understanding your clients' perspectives and opinions about your service

Date _____ Verified _____

AK3.8

Mystery shopping

You are required to know what insights mystery shopping your own agency can bring and how a mystery shopping program can improve your business

Date _____ Verified _____

AK3.9

Quality audits

You will be required to know the definition of a quality audit and the insights that you can generate from implementing a comprehensive quality program

Date _____ Verified _____

AK3.10

Pricing power

You will be required to understand the principles that connect quality and the perception of quality with your ability to drive higher fees than the market average

Date _____ Verified _____

4. Communication standards

Like any profession we are in the communication business. Being proactive in managing and delivering on expectations is at the heart of any relationship business.

<div>AK4.1</div> <div>Our profession</div>	<div>AK4.6</div> <div>Potential business leads</div>
<p>You will be required to demonstrate an understanding of the basic communication standards demanded by our profession with each stakeholder we work with</p> <p>Date _____ Verified _____</p>	<p>You will be required to know the profiles for incoming new business opportunities and the ways that your communication protocols can make or break those opportunities</p> <p>Date _____ Verified _____</p>
<div>AK4.2</div> <div>The basic principles of client communications</div>	<div>AK4.7</div> <div>Policies and procedures</div>
<p>You will be required to know the core practices that lead to proactive, high quality communications with clients that enhance the client's perception of value</p> <p>Date _____ Verified _____</p>	<p>You will be required to know how your policies and procedures manual and processes can support your efforts to drive high quality communication standards in the agency</p> <p>Date _____ Verified _____</p>
<div>AK4.3</div> <div>The information flow in an agency</div>	<div>AK4.8</div> <div>Formality vs. familiarity</div>
<p>You will be required to understand how communications flow from reception to the team and the practices you can put in place to improve those processes</p> <p>Date _____ Verified _____</p>	<p>You will be required to understand the different communication styles and how you can tailor your communication to meet the style and preferences of each stakeholder</p> <p>Date _____ Verified _____</p>
<div>AK4.4</div> <div>Defining your agency voice</div>	<div>AK4.9</div> <div>Quality standards</div>
<p>You will be required to demonstrate an understanding of what is meant by a 'voice of the agency' and how you can use that to personalise and professionalise your communications with stakeholders</p> <p>Date _____ Verified _____</p>	<p>You will be required to understand the importance of having quality standards in your agency and how to train the team to support those standards</p> <p>Date _____ Verified _____</p>
<div>AK4.5</div> <div>Stakeholder expectations</div>	<div>AK4.10</div> <div>When things start escalating</div>
<p>You will be required to demonstrate an understanding of the range of different communication preferences that a stakeholder may have and the practices you can put in place to respect those preferences</p> <p>Date _____ Verified _____</p>	<p>You will be required to know how to identify situations that are escalating beyond control and the communication practices you can implement to manage and re-assert control</p> <p>Date _____ Verified _____</p>

5. Trust accounting

Trust accounting is a collection of speciality tasks that manage the flow of funds between the different stakeholders. There are strict legal requirements that need to be mastered.

<div>AK5.1</div> <div>The receipt</div>	<div>AK5.6</div> <div>The different accounts</div>
<p>You will be required to know the requirements for issuing a receipt and the information that must be displayed on that receipt and other trust accounting records</p> <p>Date _____ Verified _____</p>	<p>You will be required to define the different accounts in a trust account, the purpose of each of them and the stakeholder that is entitled to the funds in each account</p> <p>Date _____ Verified _____</p>
<div>AK5.2</div> <div>The money lifecycle</div>	<div>AK5.7</div> <div>Disbursements</div>
<p>You will be required to know the basic flow of money through the trust account, from receipting cash over the counter through to the bank, the owner account, tradesople, agency fees, and disbursment</p> <p>Date _____ Verified _____</p>	<p>You will be required to understand how to identify funds that are available (and not available) for disbursement and how to effect the disbursement of funds from the trust account</p> <p>Date _____ Verified _____</p>
<div>AK5.3</div> <div>Internal and external invoices</div>	<div>AK5.8</div> <div>Reconciliation</div>
<p>You will be required to know the processes for processing invoices received from tradespeople and other billers and how to generate and levy internal invoices against stakeholder accounts</p> <p>Date _____ Verified _____</p>	<p>You will be required to know the principles and purpose behind a trust account reconciliation, how to perform a reconciliation in your system and how to resolve some of the most common issues</p> <p>Date _____ Verified _____</p>
<div>AK5.4</div> <div>Core risk areas</div>	<div>AK5.9</div> <div>Common issues and mistakes in trust accounting</div>
<p>You will be required to identify the most common risks associated with trust accounting and how to implement practices to manage and mitigate those risks</p> <p>Date _____ Verified _____</p>	<p>You will be required to recognise and address the most common issues that arise in the operation of the trust account and to know how to avoid those issues occurring</p> <p>Date _____ Verified _____</p>
<div>AK5.5</div> <div>The legal framework for trust accounting</div>	<div>AK5.10</div> <div>The audit</div>
<p>You will be required to understand the legal framework for operating a trust account, the core records that must be kept and the requirements for reporting on and auditing the trust account</p> <p>Date _____ Verified _____</p>	<p>You will be required to know the legal requirements for auditing the trust account and the process that the auditor will undergo to do so</p> <p>Date _____ Verified _____</p>

6. Managing tradespeople

Having reliable and trustworthy tradespeople working for your agency can be a powerful resource. Keeping up-to-date with their licenses, insurance details & service levels are ongoing tasks.

<div>AK6.1</div> <div>The basic lifecycle of a repair job</div>	<div>AK6.6</div> <div>Appointment of tradespeople</div>
<div>You will be required to define the stages of a repair job and particularly the tasks that involve the tradesperson, and the processes involved at each stage</div> <div>Date _____ Verified _____</div>	<div>You will be required to know the process for formally appointing a tradesperson to the agency and the objectives and risks that need to be covered as part of that process</div> <div>Date _____ Verified _____</div>
<div>AK6.2</div> <div>The core legal framework</div>	<div>AK6.7</div> <div>Service and quality standards</div>
<div>You will be required to understand the legal relationship that operates between the agency and the tradesperson and the owner and the risks and issues that flow from it</div> <div>Date _____ Verified _____</div>	<div>You will be required to demonstrate an understanding of how to define the standards of your agency and how to translate those standards into standards you expect and demand of your tradespeople</div> <div>Date _____ Verified _____</div>
<div>AK6.3</div> <div>Quotes and work orders</div>	<div>AK6.8</div> <div>The agency and client exposure to liability</div>
<div>You will be required to understand the difference between quotes and work orders and the purpose and implications of each</div> <div>Date _____ Verified _____</div>	<div>You will be required to know what liability your agency and your clients attract when engaging tradespeople to perform work</div> <div>Date _____ Verified _____</div>
<div>AK6.4</div> <div>How public liability insurance works</div>	<div>AK6.9</div> <div>Common issues & challenges in managing tradespeople</div>
<div>You will be required to understand the insurance regime that covers the work done by tradespeople and the risks associated with any work being done in a managed property</div> <div>Date _____ Verified _____</div>	<div>You will be required to identify the common issues that can arise when working with tradespeople and practical things you can do to manage the relationship</div> <div>Date _____ Verified _____</div>
<div>AK6.5</div> <div>The different trades and how they are regulated</div>	<div>AK6.10</div> <div>Core risk areas</div>
<div>You will be required to understand the way the trades industry is regulated and the different qualifications and specialities in it and what that means for how you work with them</div> <div>Date _____ Verified _____</div>	<div>You will be required to identify the risks that can arise when appointing tradespeople to perform work on behalf of the agency and what you can do to manage and mitigate those risks</div> <div>Date _____ Verified _____</div>

7. Risk management

Responsibly identifying and managing risks within the agency and with clients is an increasingly important skill and is crucial to any long term viability of the business.

<div>AK7.1</div> <div>Agency policies & procedures</div>	<div>AK7.6</div> <div>Key security</div>
<div>You will be required to understand the agency's approach to using policies and procedures and the importance of complying with those procedures</div> <div>Date _____ Verified _____</div>	<div>You will be required to know the rules relating to the keeping of keys for managed properties and the best practices that are generally regarded as necessary to manage common risks</div> <div>Date _____ Verified _____</div>
<div>AK7.2</div> <div>The core documents in property management</div>	<div>AK7.7</div> <div>Handling complaints</div>
<div>You will be required to know the framework for the core documents in property management, why they are important and how they are the foundation for everything we do</div> <div>Date _____ Verified _____</div>	<div>You will be required to implement processes to register complaints made about the agency and the processes that should be followed to resolve and learn from those issues as they arise</div> <div>Date _____ Verified _____</div>
<div>AK7.3</div> <div>Trust accounting risks</div>	<div>AK7.8</div> <div>Personal safety</div>
<div>You will be required to know the main risks associated with the operation of a trust account and the policies and procedures that must be in place to manage risk and ensure compliance</div> <div>Date _____ Verified _____</div>	<div>You will be required to understand the risks to personal safety that are associated with property management and the practices that must be put in place to manage and minimise those risks</div> <div>Date _____ Verified _____</div>
<div>AK7.4</div> <div>Agency records</div>	<div>AK7.9</div> <div>Building occupancy and safety issues</div>
<div>You will be required to know the obligations to maintain proper company records and the broader reasons why they are critical to any modern real estate agency</div> <div>Date _____ Verified _____</div>	<div>You will be required to recognise the increasing list of property-related safety issues that have been imposed and know what processes you must put in place to mitigate the risks to the occupant, agent and client</div> <div>Date _____ Verified _____</div>
<div>AK7.5</div> <div>Agency insurances</div>	<div>AK7.10</div> <div>Identifying risk in the department</div>
<div>You will be required to understand the basic principles governing the agency's insurance policies and the practices you must have in place to ensure the agency remains protected</div> <div>Date _____ Verified _____</div>	<div>You will be required to know how to identify the risks associated with the operation of the business and how to categorise them so that they may be prioritised and mitigated</div> <div>Date _____ Verified _____</div>

8. Working in a team

Like in any business, a Property Management team must work to build a cohesive and functioning team. Ultimately, being an agency where the best people want to work is a strategic advantage.

AK8.1

The basic dynamics of a team

You will be required to know the forces that operate within a team and the way those can be used to foster a good (and bad) team dynamic for the benefit of everyone and the agency

Date _____ Verified _____

AK8.2

Building your career

You will be required to understand the basic framework for defining your career goals and finding a way to pursue them while also serving the interests of your clients and the agency

Date _____ Verified _____

AK8.3

Team meetings

You will be required to understand the role of the team meeting and to contribute where you can. The goal is to make these meetings productive and useful

Date _____ Verified _____

AK8.4

Job descriptions and individual roles

You will be required to understand the purpose of job descriptions and know how to review yours to ensure it is still valid in your current role

Date _____ Verified _____

AK8.5

Team norms and values

You will be required to know how to identify and define your team norms and values and how to inculcate them into a team and its practices

Date _____ Verified _____

AK8.6

The evolution of a team

You will be required to understand the dynamics associated with a growing team and how your role and those of others will adjust as part of that process

Date _____ Verified _____

AK8.7

Mentorship

You will be required to understand the basic principles of mentorship and how to use your experience and perspective to help others

Date _____ Verified _____

AK8.8

Managing team expectations

You will be required to demonstrate an understanding of how to clearly state your expectations for work and how to ensure your expectations are reasonable and that they are accepted by the team

Date _____ Verified _____

AK8.9

Career check-ins

You will be required to demonstrate an understanding of the purpose and framework for your career check-ins and how they can be used to help you in your career development

Date _____ Verified _____

AK8.10

Creating a high performing team

You will be required to know the principles that go into making a high performing team and the main methods to identifying any issues in your team that need to be worked on

Date _____ Verified _____

9. Insights and reporting

Tracking, measuring and reporting can provide valuable insight into an agency’s weaknesses. Findings can aid in the development of new processes for future improvement and success.

AK9.1

The purpose of KPIs

You will be required to demonstrate an understanding of what KPIs are, what their purpose is and how they are meant to be used to improve a business

Date _____ Verified _____

AK9.2

Tracking KPIs

You will be required to know how to measure the KPIs you have designed, how you implement protocols to measure and publish those KPIs, and how to take action from the findings

Date _____ Verified _____

AK9.3

Surveying clients and stakeholders

You will be required to know what insights can be gained from seeking your clients’ feedback and perspectives on how you are performing and what you can do to improve

Date _____ Verified _____

AK9.4

Difference between data and insight

You will be required to know what is meant by ‘insight’ and how that requires a higher level of analysis and understanding than simply looking at raw data alone so that you can drive to recommendations

Date _____ Verified _____

AK9.5

Sources of data

You will be required to understand the different places you can find and use data and also ways in which you can create your own data by performing your own analysis

Date _____ Verified _____

AK9.6

Technology and software

You will be required to demonstrate an understanding of how the technology in your agency works and the full set of features that you could use to generate more insights into how the team operates

Date _____ Verified _____

AK9.7

Financial reports

You will be required to know the features of the common financial reports and the methodologies to take that data and find areas for improvement and insight

Date _____ Verified _____

AK9.8

Keeping up with industry trends

You will be required to demonstrate an understanding of the broader trends that are influencing our industry and the economy as a whole and generate recommendations to address them

Date _____ Verified _____

AK9.9

Change management

You will be required to know how to take your insights and develop recommendations for the agency that represent SMART goals and embed those into the team

Date _____ Verified _____

AK9.10

The real goals

You will be required to understand how to remain focused on the big picture and drive your insight and analysis to bringing the most value to those goals

Date _____ Verified _____

10. Property Management Basics

Understanding the basic concepts of property management brings understanding to the needs of the business, the team and its stakeholders. Everyone in the team must be across these concepts.

AK10.1

Core rights and obligations

You will be required to know the main rights and obligations of each stakeholder created by the Act and Regulations and other laws governing our industry

Date _____ Verified _____

AK10.2

Leasing

You will be required to know the objectives for the leasing task, the usual flow of work to achieve that task and common issues that arise during it

Date _____ Verified _____

AK10.3

Inspections

You will be required to know the objectives for the inspection task, the usual flow of work to achieve that task and common issues that arise during it

Date _____ Verified _____

AK10.4

Repairs and Maintenance

You will be required to know the objectives for the repairs and mainteance task, the usual flow of work to achieve that task and common issues that arise during it

Date _____ Verified _____

AK10.5

Tenancy reviews and renewals

You will be required to know the objectives for the tenancy review and renewals task, the usual flow of work to achieve that task and common issues that arise during it

Date _____ Verified _____

AK10.6

The end of a tenancy

You will be required to know the objectives for the tenancy termination task, the usual flow of work to achieve that task and common issues that arise during it

Date _____ Verified _____

AK10.7

Rent payments and tenant debts

You will be required to know the objectives for the rent payment and arrears tasks, the usual flow of work to achieve those tasks and common issues that arise during them

Date _____ Verified _____

AK10.8

Breaches and tribunal

You will be required to know the objectives for the breach and tribunal task, the usual flow of work to achieve that task and common issues that arise during it

Date _____ Verified _____

AK10.9

What makes a great property management business

You will be required to know how customers evaluate a property management business and what sets great property management businesses apart from the crowd

Date _____ Verified _____

AK10.10

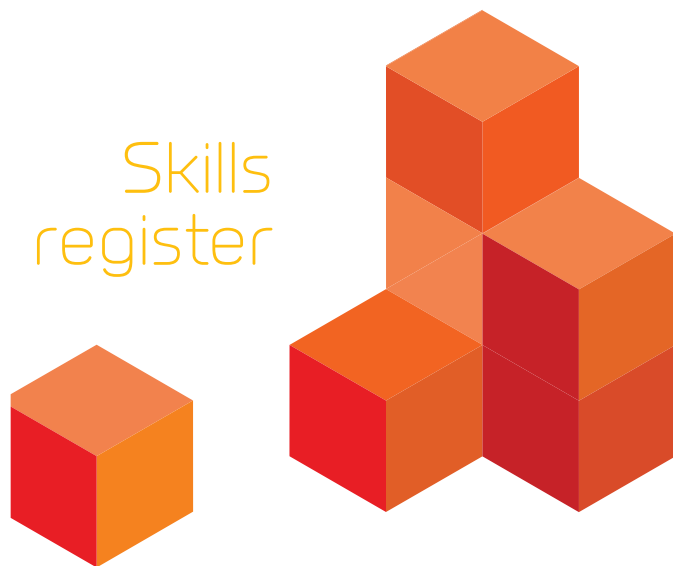
Risk management

You will be required to understand the main risks that exist within an agency and what practices can be put in place to identify, manage and mitigate those risks

Date _____ Verified _____



Skills
register



1. Driving productivity

Productivity is the force that allows the agency to do more for its clients, create more value for stakeholders and give more opportunity to those working in the team.

<div>AS1.1</div> <div>Making other people look good</div> <p>You will be required to demonstrate an ability to work in a support role for others so that they excel in their role</p> <div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div> <div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div>	<div>AS1.6</div> <div>Being a dependable partner</div> <p>You will be required to demonstrate an ability to be a reliable partner in managing your workload so that others can focus on other tasks</p> <div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div> <div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div>
<div>AS1.2</div> <div>Clarifying instructions</div> <p>You will be required to demonstrate an ability to raise issues with people who have delegated work to you so that their instructions are clear and understood</p> <div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div> <div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div>	<div>AS1.7</div> <div>Anticipating the team's needs</div> <p>You will be required to demonstrate an ability to forecast workloads and requirements before they come to pass so that you can plan ahead</p> <div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div> <div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div>
<div>AS1.3</div> <div>Speaking up if you are not sure</div> <p>You will be required to demonstrate an ability to quickly and proactively raise any issues with your colleagues if you are unsure of anything you are meant to be doing</p> <div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div> <div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div>	<div>AS1.8</div> <div>Offering a better way to do things</div> <p>You will be required to demonstrate an ability to find better ways of doing things than you currently do</p> <div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div> <div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div>
<div>AS1.4</div> <div>Working to a plan</div> <p>You will be required to demonstrate an ability to work to an agreed schedule and to an agreed level of detail and quality</p> <div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div> <div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div>	<div>AS1.9</div> <div>Knowing everything that is going on</div> <p>You will be required to demonstrate an ability to keep aware of all the things that are going on in the agency so that you can offer support at the right time when it is needed</p> <div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div> <div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div>
<div>AS1.5</div> <div>Raising issues proactively</div> <p>You will be required to demonstrate an ability to identify areas that can be improved and how the team works together and raise those issues with the team</p> <div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div> <div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div>	<div>AS1.10</div> <div>Manging unreasonable expectations</div> <p>You will be required to demonstrate an ability to manage the team's expectations for the support you and the admin team can offer, having regard to workloads and other issues</p> <div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div> <div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div>

2. Maintaining the Policies & Procedures

Policies & procedures are the foundation of any property management team. Policies define the services offered by the agency and procedures outline how the agency will implement them.

AS2.1

Making it part of what you do

You will be required to demonstrate an ability to operationalise the agency's policies and procedures in a way that covers the broad set of activities in the agency

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS2.2

Making suggestings for improvement

You will be required to demonstrate an ability to identify areas for improvement and draft recommendations for those changes to be adopted

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS2.3

Defining what's in, and what's out

You will be required to demonstrate an ability to work out what is included in your policies and procedures manual and what can be left to the discretion of the team member

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS2.4

Defining success for each procedure

You will be required to demonstrate an ability to define the purpose for each policy and procedure so that your manual is there to help people not operate as a bureaucracy

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS2.5

Defining the 'how'

You will be required to demonstrate an ability to manage the manual so that it actually helps people to do their job and not just act as an antiquated set of rules that don't help in the job

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS2.6

Measuring compliance

You will be required to demonstrate an ability to measure how your agency is using the policies and procedures and how each person is complying with the policies

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS2.7

Identifying non-compliance

You will be required to demonstrate an ability to measure whether each person is complying with the policies and what areas should be focused on by each person

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS2.8

Testing new ways of doing things

You will be required to demonstrate an ability to identify things that can be improved and then test new ways of doing things so that you can find a new path forward

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS2.9

Harnessing the team to get better

You will be required to demonstrate an ability to develop work practices to encourage more team work

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS2.10

Evolving the knowledge base

You will be required to demonstrate an ability to evolve the policies and procedures to reflect shared learnings, changing work practices and new ways of doing things

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

3. Quality control

Quality is one area where an agency can stand apart from the crowd and deliver sustained value for all stakeholders, but requires energy and discipline.

AS3.1

Understanding what your clients want

You will be required to demonstrate an ability to understand what each of your clients truly want and which areas are of the highest perceived value for each of them

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS3.2

Thinking of alternative ways to do things

You will be required to demonstrate an ability to find new ways of approaching a problem so that a better outcome is achieved for all stakeholders

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS3.3

Defining what quality means in your business

You will be required to demonstrate an ability to define what your agency stands for and what work practices reflect those values

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS3.4

Measuring everything you do

You will be required to demonstrate an ability to measure all of your work practices and work outputs so that you have a broader measure of quality than just your software KPI report

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS3.5

Working out how good you really are

You will be required to demonstrate an ability to truly work out how well your agency is performing and whether your service promises and expectations of the stakeholders are being delivered on

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS3.6

Prioritising areas to work on

You will be required to demonstrate an ability to prioritise the quality issues in your agency and develop a plan of action to work through that list of priorities

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS3.7

Embedding your point of difference

You will be required to demonstrate an ability to take your agency's point of difference and make sure that point of difference is truly lived in every element of the business

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS3.8

Continually improving the agency

You will be required to demonstrate an ability to work across the team and work to continually improve how things are done in the agency on a small, incremental basis

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS3.9

Surveying your clients

You will be required to demonstrate an ability to engage with your clients to get an accurate and insightful representation of how your agency is performing and what things can be done better

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS3.10

Defining what your core service offering is

You will be required to demonstrate an ability to define what your core service offering is and to make sure that that offering is embedded throughout your agency

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

4. Communication standards

Like any profession we are in the communication business. Being proactive in managing and delivering on expectations is at the heart of any relationship.

<div>AS4.1</div> <div>Triaging incoming phone calls</div>	<div>AS4.6</div> <div>Monitoring the quality of communications</div>
<div>You will be required to demonstrate an ability to manage the incoming phone calls coming into the agency, represent the agency well, and route the calls to the appropriate place</div> <div><div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div><div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div></div>	<div>You will be required to demonstrate an ability to monitor the quality of all communications – phone calls, letters and emails – and ensure that the quality of the agency is being maintained</div> <div><div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div><div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div></div>
<div>AS4.2</div> <div>Taking messages and following up</div>	<div>AS4.7</div> <div>Identifying areas for improvement</div>
<div>You will be required to demonstrate an ability to accurately take messages and ensure that the message is passed through and actioned by the appropriate person</div> <div><div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div><div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div></div>	<div>You will be required to demonstrate an ability to identify areas that can be improved, prioritise those issues and develop recommendations to implement</div> <div><div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div><div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div></div>
<div>AS4.3</div> <div>Accepting tenancy applications</div>	<div>AS4.8</div> <div>Working with the team to achieve excellence</div>
<div>You will be required to demonstrate an ability to accept tenancy applications and ensure that the applications are properly completed and make their way to the right person</div> <div><div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div><div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div></div>	<div>You will be required to demonstrate an ability to collaboratively work across the team drive a higher understanding of the agency's quality goals and ensure that those standards are met</div> <div><div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div><div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div></div>
<div>AS4.4</div> <div>Speaking with the voice of the agency</div>	<div>AS4.9</div> <div>Dealing with critical situations for stakeholders</div>
<div>You will be required to demonstrate an ability to represent the agency, what it stands for and its culture in all interactions with the public</div> <div><div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div><div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div></div>	<div>You will be required to demonstrate an ability to recognise issues that are important to different stakeholders and make sure that those issues are addressed appropriately</div> <div><div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div><div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div></div>
<div>AS4.5</div> <div>Managing and hitting expectations</div>	<div>AS4.10</div> <div>Dealing with unreasonable expectations</div>
<div>You will be required to demonstrate an ability to be clear with members of the public as to how you can help them and what you can do, and ensure that your promises are delivered on by the team</div> <div><div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div><div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div></div>	<div>You will be required to demonstrate an ability to work with stakeholders that have unreasonable expectations to educate them and manage them to a more reasonable place</div> <div><div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div><div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div></div>

5. Trust accounting

“Trust accounting is a collection of specialty tasks that manage the flow of funds between the different stakeholders. There are strict legal requirements to be mastered.”

<div>AS5.1</div> <div>Accepting rent, receipting and banking</div>	<div>AS5.6</div> <div>Performing internal transfers</div>
<div>You will be required to demonstrate an ability to receipt rent over the counter and do the day's banking in compliance with policies</div> <div><div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div><div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div></div>	<div>You will be required to demonstrate an ability to transfer funds between accounts – typically between tenant and landlord or landlord and agency – as and when required</div> <div><div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div><div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div></div>
<div>AS5.2</div> <div>Processing external invoices</div>	<div>AS5.7</div> <div>Reconciling a trust account</div>
<div>You will be required to demonstrate an ability to process incoming invoices and present them for approval to the appropriate team member</div> <div><div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div><div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div></div>	<div>You will be required to demonstrate an ability to reconcile a trust account and an ability to solve the most common reconciliation errors and mistakes that are made</div> <div><div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div><div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div></div>
<div>AS5.3</div> <div>Keeping records</div>	<div>AS5.8</div> <div>Keeping the books current</div>
<div>You will be required to demonstrate an ability to keep proper trust accounting records to ensure compliance with policies and legal requirements</div> <div><div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div><div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div></div>	<div>You will be required to demonstrate an ability to maintain the trust account so that there is no backlog of items to process and any issues are identified and fixed early</div> <div><div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div><div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div></div>
<div>AS5.4</div> <div>Creating internal invoices</div>	<div>AS5.9</div> <div>Disbursing funds</div>
<div>You will be required to demonstrate an ability to create internal invoices – invoices between landlord and tenants or landlord and agency – as and when required</div> <div><div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div><div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div></div>	<div>You will be required to demonstrate an ability to disburse funds to the various stakeholders according to that person's instructions</div> <div><div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div><div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div></div>
<div>AS5.5</div> <div>Receipting off a bank statement</div>	<div>AS5.10</div> <div>Managing shortfalls in funds</div>
<div>You will be required to demonstrate an ability to receipt funds into your software directly off the bank statement</div> <div><div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div><div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div></div>	<div>You will be required to demonstrate an ability to deal with the situation where there is a shortfall in funds in any account and ensure that the appropriate flags are raised with the principal</div> <div><div><div><input type="checkbox"/> Demonstration 1</div><div>Date _____</div><div>Verified _____</div></div><div><div><input type="checkbox"/> Demonstration 2</div><div>Date _____</div><div>Verified _____</div></div></div>

6. Managing tradespeople

Having reliable and trustworthy tradespeople working for your agency can be a powerful resource. Keeping up-to-date with their licenses, insurance details & service level is an ongoing task.

AS6.1

Building strong relationships with tradespeople

You will be required to demonstrate an ability to build a strong working relationship with your tradespeople

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS6.2

Identifying good tradespeople

You will be required to demonstrate an ability to find good tradespeople in your area and trial them with the agency

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS6.3

Managing your panel of tradespeople

You will be required to demonstrate an ability to maintain a panel of good quality tradespeople that can cover most of the repair and maintenance work that the agency manages

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS6.4

Verifying qualifications and details

You will be required to demonstrate an ability to properly certify whether or not a tradesperson has the proper qualifications, insurances and reputation to act as a contractor to the agency

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS6.5

Managing expectations with all stakeholders

You will be required to demonstrate an ability to understand each stakeholder's expectations during a repair or maintenance task and work to manage and meet those expectations

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS6.6

Developing a list of 'standard' pricing

You will be required to demonstrate an ability to work with tradespeople to develop a defined price list for the most common repair and maintenance items

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS6.7

Checking on work done

You will be required to demonstrate an ability to follow up after a repair or maintenance job and confirm what work has been done and the quality of that work

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS6.8

Dealing with complaints

You will be required to demonstrate an ability to deal with complaints about your tradespeople and to review the tradespeople if there are legitimate concerns

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS6.9

Maintaining quality levels

You will be required to demonstrate an ability to ensure that the agency's quality standards are met consistently across each and every repair and maintenance task

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS6.10

Ending relationships with tradespeople

You will be required to demonstrate an ability to professionally end a relationship with a tradesperson who is no longer suitable for the agency

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

7. Risk management

Responsibly identifying and managing risk within the agency and with clients is an increasingly important skill – crucial to any long term viability of the business.

AS7.1

Understanding the basic areas of responsibility

You will be required to demonstrate an ability to identify the common risks in a property management business and the impact they would make on the business if they were to eventuate

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS7.2

Managing social media responsibly

You will be required to demonstrate an ability to use social media to develop your professional profile and avoid the things that can bring your agency into disrepute

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS7.3

Workplace health and safety

You will be required to demonstrate an ability to identify and log health and safety risks that exist in your workplace, broadly defined, and implement practices to mitigate them

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS7.4

Managing cash in the agency

You will be required to demonstrate an ability to develop policies to minimise cash in the office and, when cash does come in, to safely and quickly bank those funds to reduce safety and fraud risks

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS7.5

Identifying risks in the agency

You will be required to demonstrate an ability to identify and log all risks that exist in the agency, from safety through to business and strategic risks

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS7.6

Managing and keeping the risk register

You will be required to demonstrate an ability to maintain a risk register that sets, for each risk, the probability of each risk occurring and the likely impact if it were to occur

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS7.7

Reporting issues as they arise

You will be required to demonstrate an ability to recognise when a risk has eventuated or the risk has otherwise changed and alert the right people in the agency and develop a mitigation plan

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS7.8

Staying safe during inspections

You will be required to demonstrate an ability to recognise the risks that are associated with inspection and put in place protocols to manage those risks and alert people if something happens

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS7.9

Reducing and mitigating risk

You will be required to demonstrate an ability to develop a mitigation plan for every item on the risk register and implement and monitor work practices to ensure that risks are being managed

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS7.10

Creating a culture of transparency

You will be required to demonstrate an ability to foster a culture in the team where people are comfortable with openness and raising issues quickly and honestly when issues do arise

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

8. Working in a team

Like in any business, a PM team must work to build a cohesive and functioning team. Ultimately, being an agency where the best people want to work is a strategic advantage.

AS8.1

Understanding your role and how it fits into the team

You will be required to demonstrate an ability to articulate your role in the team and the different roles in the team and how each piece of the puzzle fits together

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS8.2

Making a contribution

You will be required to demonstrate an ability to make a clear and meaningful contribution to the agency's stated goals

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS8.3

Being a member of the team

You will be required to demonstrate an ability to work in a team environment where everyone contributes and the whole is greater than the sum of its parts

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS8.4

Identifying and constructively raising issues

You will be required to demonstrate an ability to raise issues that are occurring in the team in a constructive and helpful manner and in return accept feedback on issues that may involve you

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS8.5

Developing the team's culture

You will be required to demonstrate an ability to identify and define your team's culture and identify behaviours that are consistent with, and not consistent with, your culture

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS8.6

Aligning a team to clear goals

You will be required to demonstrate an ability to define and articulate clear goals for the team so that every person in the team know what is expected of them and can work towards those goals

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS8.7

Leading, managing and mentoring a team

You will be required to demonstrate an ability lead, manage and mentor people in your team so that you support them in their career and bring out the best in them

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS8.8

Implementing HR best practice

You will be required to demonstrate an ability to implement HR practices in your team so that you appropriately support and develop your most important resources

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS8.9

Developing a recruitment strategy

You will be required to demonstrate an ability to develop a cohesive plan to build your team with the right people in the right roles at the right time

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS8.10

Developing your management style

You will be required to demonstrate a cohesive management style that reflects your ambitions, brings out the best in the team and compensates for your weaknesses

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

9. Insights and reporting

Tracking, measuring and reporting can provide valuable insight into an agency's weaknesses. Findings can aid in the development of new processes for future improvement and success.

AS9.1

Focusing on the important things

You will be required to demonstrate an ability to focus the team and the discussion on the important things in the agency

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS9.2

Measuring processes

You will be required to demonstrate an ability to measure the efficiency and effectiveness of each process in the agency

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS9.3

Expanding software usage

You will be required to demonstrate an ability to broaden the team's use of the existing software in the agency to drive better performance

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS9.4

Creating and mining data

You will be required to demonstrate an ability to creatively use tools and resources to find new ways to measure things that are of importance to the agency

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS9.5

Trialling new things

You will be required to demonstrate an ability to evaluate and trial new products that can bring greater insight or reporting in the agency

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS9.6

Recognising incorrect data

You will be required to demonstrate an ability to accurately detect red herrings and erroneous data that does not conform to your expectations or intuition

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS9.7

Finding the 'so what'

You will be required to demonstrate an ability to find the pertinent insight in your analysis so that you create a new level of understanding and perception of the issue at hand

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS9.8

Recommending change

You will be required to demonstrate an ability to take your insights and make clear and actionable recommendations for change to your leadership team

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS9.9

Testing theories

You will be required to demonstrate an ability to experiment with new theories and ways of doing things and to measure and evaluate those trials

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

AS9.10

Acting on insights

You will be required to demonstrate an ability to get the agency to do things differently because of the insights that you generate

- ☐ Demonstration 1
- Date _____ Verified _____
- ☐ Demonstration 2
- Date _____ Verified _____

10. Property Management Basics

Understanding the basic concepts of property management brings understanding to the needs of the business, the team and its stakeholders. Everyone in the team must be across these concepts.

AS10.1

Understanding the core legal documents

You will be required to demonstrate an ability to interpret the core legal documents in property management and recognise any issues with them

- ☐ Demonstration 1 Date _____ Verified _____
- ☐ Demonstration 2 Date _____ Verified _____

AS10.2

Successfully marketing a property

You will be required to demonstrate an ability to effectively market a property in any stage of the real estate cycle

- ☐ Demonstration 1 Date _____ Verified _____
- ☐ Demonstration 2 Date _____ Verified _____

AS10.3

Proactively managing the rent and collection cycle

You will be required to demonstrate an ability to implement practices that maximises the rent paid on time and mitigates arrears issues

- ☐ Demonstration 1 Date _____ Verified _____
- ☐ Demonstration 2 Date _____ Verified _____

AS10.4

Managing conflict and complaints

You will be required to demonstrate an ability to work in difficult and stressful situations and find ways to pragmatically resolve issues

- ☐ Demonstration 1 Date _____ Verified _____
- ☐ Demonstration 2 Date _____ Verified _____

AS10.5

Becoming a high quality agency

You will be required to demonstrate an ability to improve the things in your agency that are currently compromising your quality and perception of quality

- ☐ Demonstration 1 Date _____ Verified _____
- ☐ Demonstration 2 Date _____ Verified _____

AS10.6

Proactively managing repairs

You will be required to demonstrate an ability to effect repairs on a property with efficiency while managing the risks associated with the work

- ☐ Demonstration 1 Date _____ Verified _____
- ☐ Demonstration 2 Date _____ Verified _____

AS10.7

Managing and keeping the risk register

You will be required to demonstrate an ability to create and manage the agency's risk register so that risks are identified and mitigated

- ☐ Demonstration 1 Date _____ Verified _____
- ☐ Demonstration 2 Date _____ Verified _____

AS10.8

Handling the end of tenancy issues effectively

You will be required to demonstrate an ability to evaluate a tenancy and, as appropriate, seek to have it renewed, terminated or varied depending on the circumstances

- ☐ Demonstration 1 Date _____ Verified _____
- ☐ Demonstration 2 Date _____ Verified _____

AS10.9

Communicating with the owner

You will be required to demonstrate an ability to proactively communicate with the owner so that their wishes are met and issues addressed

- ☐ Demonstration 1 Date _____ Verified _____
- ☐ Demonstration 2 Date _____ Verified _____

AS10.10

Acting in an ethical manner

You will be required to demonstrate an ability to always act within the broad ethical framework that guides our profession

- ☐ Demonstration 1 Date _____ Verified _____
- ☐ Demonstration 2 Date _____ Verified _____



Experience
log



1. Driving productivity

Productivity is the force that allows the agency to do more for its clients, create more value for stakeholders and give more opportunity to those working in the team.

AE1.1

Ask each person in the team their view on how you can help them in their role

Team Member Name	Recommendation	Date	Verified
John Smith	I can help you...	14/05/2015	EK
Team Member 1			
Team Member 2			
Team Member 3			
Team Member 4			
Team Member 5			

Congratulations! You can now check off Experience Task AE1.1 in your Career Passport

AE1.2

Develop a checklist before taking on new work, including expected completion time and outputs

Checklist Complete (Y/N)	Completion Time	Outputs	Date	Verified
Y	10 mins	Checklist outlining how I was to upload properties to portal	14/05/2015	EK
Checklist 1				
Checklist 2				
Checklist 3				
Checklist 4				
Checklist 5				
Checklist 6				

Congratulations! You can now check off Experience Task AE1.2 in your Career Passport

Driving productivity cont.

AE1.3

Support each person in the team for a defined task at least once

Description of task	Date	Approved by	Verified
Check references	14/05/2015	Michelle	EK
Task 1			
Task 2			
Task 3			
Task 4			
Task 5			
Congratulations! You can now check off Experience Task AE1.3 in your Career Passport			

AE1.4

Ask the team leader to review how you are keeping records and notes

Team Leader	Satisfactory / Not Yet Satisfactory	Date	Verified
Sally Brown	S	14/05/2015	EK
Review			
Congratulations! You can now check off Experience Task AE1.4 in your Career Passport			

AE1.5

Seek open and constructive feedback from each person you work with regularly

Name	Feedback/Comments	Date	Verified
Jake	Asked to not speak so loudly on phone	14/11/2014	EK
Team Member 1			
Team Member 2			
Team Member 3			
Team Member 4			
Team Member 5			
Congratulations! You can now check off Experience Task AE1.5 in your Career Passport			

AE1.6

Implement 2 new technologies into the agency

New technology summary	Date	Verified
Digital key tracker	14/05/2015	EK
Technology 1		
Technology 2		
Congratulations! You can now check off Experience Task AE1.6 in your Career Passport		

AE1.7

Implement a major change that significantly reduces the time and effort needed to complete a task

Change suggested (include how this saves time/effort)	Date	Verified
Key audits - digital tracking	14/05/2015	EK
Change		
Congratulations! You can now check off Experience Task AE1.7 in your Career Passport		

AE1.8

Identify 5 areas that could be improved to drive increased productivity in the team

Area for improvement	Implemented	Date	Verified
Receptionist to implement new phone message app for the team	✓	14/11/2014	EK
Area 1			
Area 2			
Area 3			
Area 4			
Area 5			
Congratulations! You can now check off Experience Task AE1.8 in your Career Passport			

AE1.9

Fill in for another team member for a day

Team member	Reason for filling in	Date	Verified
Peter	Sick	14/05/2015	EK
Week 1			
Congratulations! You can now check off Experience Task AE1.9 in your Career Passport			

AE110

Make five recommendations to improve the agency's productivity

Recommendation	Date	Verified
Implement an ideal week calendar	14/05/2015	EK
Recommendation 1		
Recommendation 2		
Recommendation 3		
Recommendation 4		
Recommendation 5		
Congratulations! You can now check off Experience Task AE110 in your Career Passport		

2. Maintaining the Policies & Procedures

Policies & procedures are the foundation of any property management team. Policies define the services offered by the agency and procedures outline how the agency will implement them.

AE2.1

Read the agency's policies and procedures manual

Read Manual (Y/N)	Date	Verified
Y	14/05/2015	EK
Task 1		
Congratulations! You can now check off Experience Task AE2.1 in your Career Passport		

AE2.2

Suggest three improvements to an area of your work from the policy and procedure manual

Job Area	Suggested Improvement	Date	Verified
After hours	Have an after hours number routed to a team member on rotation	14/05/2015	EK
Suggestion 1			
Suggestion 2			
Suggestion 3			
Congratulations! You can now check off Experience Task AE2.2 in your Career Passport			

AE2.3

From your experience, suggest 3 improvements to the policy and procedure manual across 3 different chapters

Suggestion	Chapter	Date verified	Verified
Rewrite team roles to match current team	1	14/05/2015	EK
Suggestion 1			
Suggestion 2			
Suggestion 3			
Congratulations! You can now check off Experience Task AE2.3 in your Career Passport			

AE2.4

Visit another agency on a study tour and review it's policies and procedures manual

Review Complete Y/N	Date	Verified
Y	14/05/2015	EK

FAQ

Congratulations! You can now check off Experience Task **AE2.4** in your Career Passport

AE2.5

Identify 3 situations that have arisen that were not covered by the manual

Description of situation	Date	Verified
Angry client at reception	14/05/2015	EK

Situation 1

Situation 2

Situation 3

Congratulations! You can now check off Experience Task **AE2.5** in your Career Passport

AE2.6

Survey the staff to find out how regularly they are following the manual

Name	Following the manual regularly Y/N	Ideas for improvement	Date	Verified
Kelly	N	More letters and forms	14/05/2015	EK

Person 1

Person 2

Person 3

Person 4

Person 5

Congratulations! You can now check off Experience Task **AE2.6** in your Career Passport

AE2.7

Audit 20 files and identify the 5 main areas of non-compliance

# of times appeared as a problem	Issue	Idea for improvement	Date	Verified
12	Ingoing inspection form not returned	Conduct an in-house training session	14/05/2015	EK

Area 1

Area 2

Area 3

Area 4

Area 5

Congratulations! You can now check off Experience Task **AE2.7** in your Career Passport

AE2.8

Update 10 letters in the manual to make them more effective

Letter covers	Letter dated Y/N	Date	Verified
Arrears	Y	14/05/2015	EK

Letter 1

Letter 2

Letter 3

Letter 4

Letter 5

Letter 6

Letter 7

Letter 8

Letter 9

Letter 10

Congratulations! You can now check off Experience Task **AE2.8** in your Career Passport

AE2.9

For 6 months, include in the first team meeting of each month a review of a chapter of the policies & procedures manual for training and improvement purposes

Attendees	Training session	Changes recorded	Date	Verified
Peter, John, Chris	Handling Cash	✓	14/05/2015	EK
Month 1				
Month 2				
Month 3				
Month 4				
Month 5				
Month 6				
Congratulations! You can now check off Experience Task AE2.9 in your Career Passport				

AE2.10

Induct a new team member into the agency's policies and procedures and monitor their usage for the first 2 months

Name	Induction process	Progress	Date	Verified
Pete	Face to face training	A little rusty	14/05/2015	EK
Month 1				
Month 2				
Congratulations! You can now check off Experience Task AE2.10 in your Career Passport				

3. Quality control

Quality is the one area where an agency can stand apart from the crowd and deliver sustained value for all stakeholders, but requires energy and discipline.

AE3.1

Identify 3 companies that you think offer high quality and describe why you think that

Company Name	Description of Quality	Date	Verified
Apple	Good quality products. Fast/free service..	14/05/2015	EK
Company 1			
Company 2			
Company 3			
Congratulations! You can now check off Experience Task AE3.1 in your Career Passport			

AE3.2

Identify 5 things you can do to improve the perceived quality of the agency

Suggestion	Implemented into business Y/N	Date	Verified
Commit to 2 hour turn-around for all enquiries	Y	20/05/2015	EK
Improvement 1			
Improvement 2			
Improvement 3			
Improvement 4			
Improvement 5			
Congratulations! You can now check off Experience Task AE3.2 in your Career Passport			

AE3.3

Develop a KPI for measuring quality across the agency

Time taken to return calls	KPI Complete Y/N	Date	Verified
< 25 mins	Y	14/05/2015	EK
KPI			
Congratulations! You can now check off Experience Task AE3.3 in your Career Passport			

AE3.4

Review the landlord research to understand what clients want and develop a recommendation for change

Major recommendation	Date	Verified
Review our communication policies to be more transparent and open	14/05/2015	EK

Congratulations! You can now check off Experience Task **AE3.4** in your Career Passport

AE3.5

Implement a major change that significantly improves the quality of service delivered to clients

Major change implemented (describe)	Date	Verified
Monthly investment letter from Principal	14/05/2015	EK

Major change

Congratulations! You can now check off Experience Task **AE3.5** in your Career Passport

AE3.6

Audit 10 files for quality and present the findings to the team

Address	Findings	Date	Verified
15 Smith Street	The ingoing inspection report was not returned by the tenant and the reletting fee was not charged	14/05/2015	EK
File 1			
File 2			
File 3			
File 4			
File 5			
File 6			
File 7			
File 8			
File 9			
File 10			

Congratulations! You can now check off Experience Task **AE3.6** in your Career Passport

AE3.7

Calculate your team utilisation rate at 3 month intervals

Utilisation Rate	Properties managed	Utilisation Rate	Date	Verified
Portfolio 1	135	90%	14/05/2015	EK
Quarter 1				
Quarter 2				
Quarter 3				
Quarter 4				

Congratulations! You can now check off Experience Task **AE3.7** in your Career Passport

AE3.8

Survey your clients asking for their view on your point of difference and create a summary of the findings

Summary of findings	Date	Verified
Our client found it difficult to get hold of us when they need us	14/05/2015	EK

Survey

Congratulations! You can now check off Experience Task **AE3.8** in your Career Passport

AE3.9

Identify different work practices across portfolios and develop a training program for the team to align them

Work Practice	Training Program Name	Training implemented	Date	Verified
Answering calls	Tone of voice & being engaging	✓	14/05/2015	EK
Item 1				
Item 2				
Item 3				
Item 4				
Item 5				

Congratulations! You can now check off Experience Task **AE3.9** in your Career Passport

AE3.10

Perform a training session for the whole team focusing on avoiding common mistakes in trust accounting

Topic	Common Fault	Attendees	Date	Verified
Tradespeople workorders	The workorders are not clear and tradies won't agree to do the work	Peter, Alan, Josef	14/05/2015	EK

Congratulations! You can now check off Experience Task **AE3.10** in your Career Passport

4. Communication standards

Like any profession we are in the communication business. Being proactive in managing and delivering on expectations is at the heart of any relationship business.

AE4.1

Review the agency’s communication policies and ask questions about any ambiguities

Communication Policy	Question Raised	Date	Verified
Time taken to return phone calls	Is there an agency KPI?	14/05/2015	EK
Policy 1			
Policy 2			
Policy 3			
Policy 4			
Policy 5			
Congratulations! You can now check off Experience Task AE4.1 in your Career Passport			

AE4.2

Develop a clear process for passing on phone messages

Process Suggested	Responsibility	Date	Verified
Log messages in a Google drive spreadsheet	Jen	14/05/2015	EK
Process			
Congratulations! You can now check off Experience Task AE4.2 in your Career Passport			

AE4.3

Develop scripts & dialogues and procedures for the 10 most common phone and walk in requests

Topic	Script Complete Y/N	Date	Verified
What are your fees?	✓	14/05/2015	EK
#1			
#2			
#3			
#4			
#5			
#6			
#7			
#8			
#9			
#10			
Congratulations! You can now check off Experience Task AE4.3 in your Career Passport			

AE4.4

Randomly review 10 outbound emails each week and discuss them at the team meeting

Findings	Discussed at team meeting	Date	Verified
Email is too informal and has typos	✓	14/05/2015	EK
Week 1			
Week 2			
Week 3			
Week 4			
Week 5			
Congratulations! You can now check off Experience Task AE4.4 in your Career Passport			

AE4.5

Coordinate grammar and writing training for all team members

Training Complete Y/N	Name	Date	Verified
✓	Anna	14/05/2015	EK
Person 1			
Person 2			
Person 3			
Person 4			
Person 5			
Congratulations! You can now check off Experience Task AE4.5 in your Career Passport			

AE4.6

Review the agency’s complaints register and identify the 5 most common complaints relating to communication

Complaint	Solution	Date	Verified
Not calling back within a reasonable time	New agency KPI re: time taken to return a call & team training	14/05/2015	EK
Complaint 1			
Complaint 2			
Complaint 3			
Complaint 4			
Complaint 5			
Congratulations! You can now check off Experience Task AE4.6 in your Career Passport			

AE4.7Implement a process for measuring how long it takes to return a phone call or email

Process complete Y/N	Implemented	Date	Verified
EXAMPLE ONLY Y	EXAMPLE ONLY ✓	14/05/2015	EK

Attach

Congratulations! You can now check off Experience Task AE4.7 in your Career Passport

AE4.8Develop communication standards for your agency’s policies and procedures manual, including time to return phone calls and emails

Communication Standards process complete Y/N	Implemented	Date	Verified
EXAMPLE ONLY Y	EXAMPLE ONLY ✓	14/05/2015	EK

Attach

Congratulations! You can now check off Experience Task AE4.8 in your Career Passport

AE4.9Identify the 10 most common letter/email templates and update them to reflect the agency’s voice

File name	Date	Verified
EXAMPLE ONLY Letter to tenant in category 1 arrears	14/05/2015	EK
#1		
#2		
#3		
#4		
#5		
#6		
#7		
#8		
#9		
#10		

Congratulations! You can now check off Experience Task AE4.9 in your Career Passport

AE4.10Develop a persona for the agency to assist in the definition of the agency's voice

Persona Name	Profile Complete Y/N	Date	Verified
EXAMPLE ONLY Alicia	EXAMPLE ONLY ✓	14/05/2015	EK

Attach

Congratulations! You can now check off Experience Task AE4.10 in your Career Passport

5. Trust accounting

Trust accounting is a collection of speciality tasks that manage the flow of funds between the different stakeholders. There are strict legal requirements that need to be mastered.

AE5.1Receipt rent over the counter 10 times

Property Address	Amount	Date	Verified
EXAMPLE ONLY 5A Blue Street	EXAMPLE ONLY \$500	14/05/2015	EK
Receipt 1			
Receipt 2			
Receipt 3			
Receipt 4			
Receipt 5			
Receipt 6			
Receipt 7			
Receipt 8			
Receipt 9			
Receipt 10			

Congratulations! You can now check off Experience Task AE5.1 in your Career Passport

AE5.2Read the Acts and Regulations governing to trust accounting

Source	Read Y/N	Date	Verified
EXAMPLE ONLY The Estate Agents’ Act	EXAMPLE ONLY Y	14/05/2015	EK
Act			
Regulations			

Congratulations! You can now check off Experience Task AE5.2 in your Career Passport

AE5.3

Review the adjustments ledger and list the top 3 reasons for the transactions

Reason	Recommendation for improvement	Date	Verified
Payment	Perform training for receptionist	14/05/2015	EK
Reason 1			
Reason 2			
Reason 3			
Congratulations! You can now check off Experience Task AE5.3 in your Career Passport			

AE5.4

Set up the software to accept electronic receipting of rent

Software type	Electronic receipting complete Y/N	Date	Verified
Rent Master	Y	14/05/2015	EK
Congratulations! You can now check off Experience Task AE5.4 in your Career Passport			

AE5.5

Identify and train 'problem' tenants who are not using the correct reference number when paying rent

Tenant Name	Tenant issue resolved	Date	Verified
Peter Shephard	Y	14/05/2015	EK
Tenant 1			
Tenant 2			
Tenant 3			
Tenant 4			
Tenant 5			
Tenant 6			
Tenant 7			
Tenant 8			
Tenant 9			
Tenant 10			
Congratulations! You can now check off Experience Task AE5.5 in your Career Passport			

AE5.6

Develop a recommendation for how you could offer multiple disbursements options in each month

Recommendation	Date	Verified
Disburse funds daily	14/05/2015	EK
Recommendation		
Congratulations! You can now check off Experience Task AE5.6 in your Career Passport		

AE5.7

Shadow a full day of trust accounting using a pen, paper and T-accounts

Shadow day complete Y/N	Date	Verified
Y	14/05/2015	EK
Trust Accounting		
Congratulations! You can now check off Experience Task AE5.7 in your Career Passport		

AE5.8

Identify 3 areas that could be improved to reduce risks associated with the trust account

Area of risk	Suggested improvement	Date	Verified
Cash in office	Discourage use of cash	14/05/2015	EK
Area 1			
Area 2			
Area 3			
Congratulations! You can now check off Experience Task AE5.8 in your Career Passport			

AE5.9

Conduct 3 full trust audits

Trust Audit	Key findings	Date	Verified
July	Change way electronic receipts are emailed to tenant	14/05/2015	EK
Audit 1			
Audit 2			
Audit 3			
Congratulations! You can now check off Experience Task AE5.9 in your Career Passport			

AE5.10	Develop a training program for all team members on trust accounting			
	Training Program	Attendees	Date	Verified
	Introductory Trust Accounting	Jake, Emma, John	15/05/2015	EK

Congratulations! You can now check off Experience Task **AE5.10** in your Career Passport

6. Managing tradespeople

Having reliable and trustworthy tradespeople working for your agency can be a powerful resource. Being across their licenses, insurance details and service level is an ongoing task.

AE6.1	Review a sample of work orders and quote requests from the agency files and list 3 main observations		
	Observation	Date	Verified
SAMPLE ONLY	The work orders include the tenants contact details	15/05/2015	EK
Observation 1			
Observation 2			
Observation 3			
Congratulations! You can now check off Experience Task AE6.1 in your Career Passport			

AE6.2	Observe 3 different tradespeople perform repair jobs on behalf of the agency			
	Property/Address	Repair job	Date	Verified
	3 Grey Street	Fix leaky tap	14/05/2015	EK
	Tradesperson 1			
	Tradesperson 2			
	Tradesperson 3			
Congratulations! You can now check off Experience Task AE6.2 in your Career Passport				

AE6.3 Review the tradesperson appointment contract and make 2 recommendations for improvement				
Observation		Recommendation	Date	Verified
There is no provision for reviewing the tradies insurance details		Reveiwed 6 monthly	14/05/2015	EK
Recommendation 1				
Recommendation 2				
Congratulations! You can now check off Experience Task AE6.3 in your Career Passport				

AE6.4

Review each tradesperson file each year for compliance with qualification and insurance requirements

Tradesperson	Year	Qualification	Compliant with insurance Y/N	Date	Verified
AJ Plumbing	2015	Cert IV Foreman	Y	14/05/2015	EK
Contract 1					
Contract 2					
Contract 3					
Contract 4					
Contract 5					
Contract 6					
Contract 7					
Contract 8					
Contract 9					
Contract 10					
Congratulations! You can now check off Experience Task AE6.4 in your Career Passport					

AE6.5

Implement a set of service standards that tradespeople are expected to meet

Service Standard sent to client	Date	Verified
Before and after photos of completed job must be taken and emailed	14/05/2015	EK
Standard 1		
Standard 2		
Standard 3		
Standard 4		
Standard 5		
Congratulations! You can now check off Experience Task AE6.5 in your Career Passport		

AE6.6

Work with the most 'regular' 5 tradespeople and develop a menu of prices for common work

Tradesperson	Pricelist Developed Y/N	Date	Verified
AJ Plumbing	Y	14/05/2015	EK
Tradesperson 1			
Tradesperson 2			
Tradesperson 3			
Tradesperson 4			
Tradesperson 5			
Congratulations! You can now check off Experience Task AE6.6 in your Career Passport			

AE6.7

Design and implement a tenant survey to send after each job to check on the work done

Tenant Survey Complete	Date	Verified
Y	14/05/2015	EK
Attach		
Congratulations! You can now check off Experience Task AE6.7 in your Career Passport		

AE6.8

Develop and implement a quarterly BBQ for the agency's tradespeople

BBQ held Y/N	Number of attendees	Date	Verified
Y	12	14/05/2015	EK
BBQ 1			
BBQ 2			
BBQ 3			
BBQ 4			
BBQ 5			
Congratulations! You can now check off Experience Task AE6.8 in your Career Passport			

AE6.9

Work with your tradespeople to develop FAQs for the 10 most common repair issues to send to tenants and owners

Issue	Description	FAQ Developed Y/N	Date	Verified
Squeaky Door	Apply WD40	Y	14/05/2015	EK
Issue 1				
Issue 2				
Issue 3				
Issue 4				
Issue 5				
Issue 6				
Issue 7				
Issue 8				
Issue 19				
Issue 10				
Congratulations! You can now check off Experience Task AE6.9 in your Career Passport				

AE6.10

Identify the lowest quality tradesperson and develop a plan to remediate

Tradesperson	Remediation Plan	Date	Verified
Croney's carpentry	Search for new carpenter and trial 3	14/05/2015	EK
Plan			
Congratulations! You can now check off Experience Task AE6.10 in your Career Passport			

7. Risk management

Responsibly identifying and managing risks within the agency and with clients is an increasingly important skill – crucial to any long term viability of the business.

AE7.1

Review your job description and amend with supervisor if necessary

Name	Recommened Change	Supervisor Name	Date	Verified
Alicia	Update to reflect new role responsibilities	Jen	14/05/2015	EK
Review				
Congratulations! You can now check off Experience Task AE7.1 in your Career Passport				

AE7.2

Perform a departmental key audit and identify 2 areas for improvement

Improvement	Date	Verified
Have a key check-out/check-in register at reception	15/04/2015	EK
Area 1		
Area 2		
Congratulations! You can now check off Experience Task AE7.2 in your Career Passport		

AE7.3

Analyse the risks associated with accepting cash for rent and recommend a change to manage that risk

Risk	Recommended change	Date	Verified
Money could be misplaced	Do a bank run each afternoon at 3pm	14/05/2015	EK
Risk 1			
Risk 2			
Congratulations! You can now check off Experience Task AE7.3 in your Career Passport			

AE7.4

Identify the top 3 areas of risk within the agency and suggest improvements

Area of risk	Suggested improvement	Date	Verified
WH&S	Store boxes that are cluttering up the walkways 5 deep	14/05/2015	EK
Area 1			
Area 2			
Area 3			
Congratulations! You can now check off Experience Task AE7.4 in your Career Passport			

AE7.5

Perform 10 property file spot checks and document the findings to share with the team

File	Findings	Shared with team	Date	Verified		
EXAMPLE ONLY	5 Pines Road	No Authority	✓	EXAMPLE ONLY	14/05/2015	EK
File 1						
File 2						
File 3						
File 4						
File 5						
File 6						
File 7						
File 8						
File 9						
File 10						
Congratulations! You can now check off Experience Task AE7.5 in your Career Passport						

AE7.6

Research the best personal safety apps and install 1 of them on all phones in the agency

App	Description	Cost	Date	Verified
Panic Alarm	Panic Alarm for during inspection	\$0.99	14/05/2015	EK
App 1				
App 2				
App 3				
App 4				
App 5				
App 6				
App 7				
App 8				
App 9				
App 10				
Congratulations! You can now check off Experience Task AE7.6 in your Career Passport				

AE7.7

Perfrom a property risk assesment before signing 10 new management agreements

Property	Risk assessment complete	Management agreement signed	Date	Verified
EXAMPLE ONLY	28 Green St	EXAMPLE ONLY	14/05/2015	EK
Property 1				
Property 2				
Property 3				
Property 4				
Property 5				
Property 6				
Property 7				
Property 8				
Property 9				
Property 10				
Congratulations! You can now check off Experience Task AE7.7 in your Career Passport				

AE7.8

Run a risk management workshop for the team

Workshop Description	Attendees	Date	Verified
EXAMPLE ONLY	Safety at OFIs	Jane, Billy, John	EXAMPLE ONLY
14/05/2015	EK		
Workshop			
Congratulations! You can now check off Experience Task AE7.8 in your Career Passport			

AE7.9

Complete an online course on risk management

Course Provider	Summary of course	Date	Verified
Apmasphere	Managing your risk register	14/05/2015	EK
Course			
Congratulations! You can now check off Experience Task AE7.9 in your Career Passport			

AE7.10

Create 3 KPIs associated with mitigating risk and the risk register

Description of risk	RPI	Date	Verified
Cash in the office	No cash in the office at close of business	14/05/2015	EK
KPI 1			
KPI 2			
KPI 3			
Congratulations! You can now check off Experience Task AE7.10 in your Career Passport			

8. Working in a team

Like in any business, a PM team must work to build a cohesive and functioning team. Ultimately, being an agency where the best people want to work is a strategic advange.

AE8.1

Define your career ambitions into 25 words or less

Career Ambition	Date	Verified
My ambition for my career is...	15/04/2015	EK
Ambition		
Congratulations! You can now check off Experience Task AE8.1 in your Career Passport		

AE8.2

Review and suggest two changes to your weekly team meeting

Recommended change	Date	Verified
Add five minute training sessions	15/04/2015	EK
Change 1		
Change 2		
Congratulations! You can now check off Experience Task AE8.2 in your Career Passport		

AE8.3

Spend 1 day working wtih each person in the team to understand what they do

Team Member	Role	Desciption/Summary of Activities	Date	Verified
John Smith	Administration	Rewriting letters	15/04/2015	EK
Team Member 1				
Team Member 2				
Team Member 3				
Team Member 4				
Team Member 5				
Congratulations! You can now check off Experience Task AE8.3 in your Career Passport				

AE8.4

Develop 3 case studies around when the team worked well together

Case Study Name	Crux of case study	Date	Verified
Hillside Drive	Dealing with an abandoned property. The whole team came together and pitched in.	15/04/2015	EK
Case study 1			
Case study 2			
Case study 3			
Congratulations! You can now check off Experience Task AE8.4 in your Career Passport			

AE8.5

Develop 3 case studies around when the team worked poorly together

Case Study Name	Crux of case study	Date	Verified
33 Ocean Avenue	A property manager was sick and no-one knew what to do. The Landlord and Tenant complained.	15/04/2015	EK
Case study 1			
Case study 2			
Case study 3			
Congratulations! You can now check off Experience Task AE8.5 in your Career Passport			

AE8.6

Behaviour	Date	Verified
Answering the phone for a team member after 4 rings	15/04/2015	EK
Positive 1		
Positive 2		
Positive 3		
Positive 4		
Positive 5		
Negative 1		
Negative 2		
Negative 3		
Negative 4		
Negative 5		

Congratulations! You can now check off Experience Task **AEB.6** in your Career Passport

AE8.7

Team member	Q1	Q2	Q3	Q4	Date	Verified
Anna	✓				15/04/2015	EK
Person 1						
Person 2						
Person 3						
Person 4						
Person 5						

Congratulations! You can now check off Experience Task **AE8.7** in your Career Passport

AE8.8

Team building program theme	Attendees	Date	Verified
Problem Solving	PK, LD, AJ, LM, PP	15/04/2015	EK

Person 1

Congratulations! You can now check off Experience Task **AE8.8** in your Career Passport

AE8.9

Congratulations! You can now check off Experience Task **AE8.8** in your Career Passport

AE8.10

Name	KPI	How does KPI improve teamwork	Date	Verified
Anna	Each team member presents case study of learning at each team meeting	Team training	15/04/2015	EK
Person 1				
Person 2				
Person 3				
Person 4				
Person 5				

Congratulations! You can now check off Experience Task AE8.10 in your Career Passport

9. Insights and reporting

Tracking, measuring and reporting can provide valuable insight into an agency’s weaknesses. Findings can aid in the development of new processes for future improvement and success.

AE9.1

Undertake an advanced software course

Course provider	Course Name/Topic	Date	Verified
CBD College	Features in rent master	14/05/2015	EK
Course			
Congratulations! You can now check off Experience Task AE9.1 in your Career Passport			

AE9.2

Survey 10 clients who were 'lost' to other agents to understand the reasons

Client Name	Lost business to...	Reason	Date	Verified
Jane Summers	Peter's Realty	Personalised service	14/05/2015	EK
Client 1				
Client 2				
Client 3				
Client 4				
Client 5				
Client 6				
Client 7				
Client 8				
Client 9				
Client 10				
Congratulations! You can now check off Experience Task AE9.2 in your Career Passport				

AE9.3

Recommend 2 new KPIs to implement, and 2 to discontinue

KPI	Date	Verified
Increase use of SMS by 10%	14/05/2015	EK
Start 1		
Start 2		
Stop 1		
Stop 2		
Congratulations! You can now check off Experience Task AE9.3 in your Career Passport		

AE9.4

Make 5 changes to how the team operates based on insights you have developed

Team operation	Insight	Change suggested	Date	Verified
Integration	No common schedule	Daily standup	14/05/2015	EK
Change 1				
Change 2				
Change 3				
Change 4				
Change 5				
Congratulations! You can now check off Experience Task AE9.4 in your Career Passport				

AE9.5

Create a register of insights for the team to learn from

Register complete Y/N	Date	Verified
Y	14/05/2015	EK
Register: Attach		
Congratulations! You can now check off Experience Task AE9.5 in your Career Passport		

AE9.6

Identify 2 broad industry trends and make recommendations on things that you can implement to take advantage of them

Trend Description	Recommendation on how to adopt	Date	Verified
Digital key register	Investigate suppliers	14/05/2015	EK
Trend 1			
Trend 2			
Congratulations! You can now check off Experience Task AE9.6 in your Career Passport			

AE9.7

Develop an insightful new report for the agency that uses data from outside your software

Report Name	External Source	Date	Verified
Market Share	Bureau of Statistics, Pricefinder	14/05/2015	EK
Attach			
Congratulations! You can now check off Experience Task AE9.7 in your Career Passport			

AE9.8

Test 5 new theories to evaluate their value

Theory description	Value /10	Date	Verified
Tenants unlikely to fall into arrears if they know our arrears policy	/10	14/05/2015	EK
Theory 1	/10		
Theory 2	/10		
Theory 3	/10		
Theory 4	/10		
Theory 5	/10		
Congratulations! You can now check off Experience Task AE9.8 in your Career Passport			

AE9.9

Perform an exit survey on 5 team members as they leave your team

Name	Exit Interview conducted	Date	Verified
Miranda	The team's goals were unclear	14/05/2015	EK
Person 1			
Person 2			
Person 3			
Person 4			
Person 5			
Congratulations! You can now check off Experience Task AE9.9 in your Career Passport			

AE9.10

Review your business plan based on insights learned over the past year

Review Complete Y/N	Date	Verified
Y	14/05/2015	EK
Attach		
Congratulations! You can now check off Experience Task AE9.10 in your Career Passport		

10. Property Management Basics

Understanding the basic concepts of property management brings understanding to the needs of the business, the team and its stakeholders. Everyone in the team must be across these concepts.

AE10.1

Read the Act

Name of Act	Complete (Y/N)	Date	Verified
Residential Tenancies Act	Y	14/05/2015	EK

Congratulations! You can now check off Experience Task **AE10.1** in your Career Passport

AE10.2

Attend 10 open homes as an observer

Address	Date	Verified
210 Farm Street	14/05/2015	EK
Open Home 1		
Open Home 2		
Open Home 3		
Open Home 4		
Open Home 5		
Open Home 6		
Open Home 7		
Open Home 8		
Open Home 9		
Open Home 10		

Congratulations! You can now check off Experience Task **AE10.2** in your Career Passport

AE10.3

Identify 10 repairs directly related to Body Corp or Strata issues

Repair description	Date	Verified
Burst water pipe	14/05/2015	EK
Repair 1		
Repair 2		
Repair 3		
Repair 4		
Repair 5		
Repair 6		
Repair 7		
Repair 8		
Repair 9		
Repair 10		

Congratulations! You can now check off Experience Task **AE10.3** in your Career Passport

AE10.4

Issue 10 terminations notices

Tenant	Reason	Notice Issued	Date	Verified
Peter Road	Tenant in arrears	✓	14/05/2015	EK
Notice 1				
Notice 2				
Notice 3				
Notice 4				
Notice 5				
Notice 6				
Notice 7				
Notice 8				
Notice 9				
Notice 10				

Congratulations! You can now check off Experience Task **AE10.4** in your Career Passport

AE10.5

Review the risk register and suggest 2 new risks to monitor

Risk	How it will be monitored	Date	Verified
Cash in the office	Daily banking process and principal review and deposit slips	14/05/2015	EK

Risk 1

Risk 2

Congratulations! You can now check off Experience Task **AE10.5** in your Career Passport

AE10.6

Run a landlord event

Theme of event	Location	Date of event	Date	Verified
The state of the property market	Royal Pines	28th January	14/05/2015	EK

Event

Congratulations! You can now check off Experience Task **AE10.6** in your Career Passport

AE10.7

Successfully resolve 5 complaints to the agency

Complaint	Resolution	Date	Verified
Not calling the landlord	Letter of apology and office training	14/05/2015	EK

Complaint 1

Complaint 2

Complaint 3

Complaint 4

Complaint 5

Congratulations! You can now check off Experience Task **AE10.7** in your Career Passport

AE10.8

Audit 10 files for compliance

File	Compliance issues	Date	Verified
3 Ocean Avenue	Ingoing inspection report not returned by tenant	14/05/2015	EK

File 1

File 2

File 3

File 4

File 5

File 6

File 7

File 8

File 9

File 10

Congratulations! You can now check off Experience Task **AE10.8** in your Career Passport

AE10.9

Audit 10 files for quality

File	Quality Issues	Date	Verified
4 Glen Street	The owner did not receive a post-repair report	14/05/2015	EK

File 1

File 2

File 3

File 4

File 5

File 6

File 7

File 8

File 9

File 10

Congratulations! You can now check off Experience Task **AE10.9** in your Career Passport

AE10.10

Identify 2 things to change to improve the quality levels

What is being changed	Recommended improvement	Date	Verified
End of month statement	Include market commentary	14/05/2015	EK

Item 1

Item 2

Congratulations! You can now check off Experience Task **AE10.10** in your Career Passport



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