

New Management Template Checklist - Jacob

in list [New Management Checklist](#)

MEMBERS

SS

Description

Add a more detailed description...

New Client Delete

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- Review Form 6 - Correct signing, Insurance Details, Bank Account Details, Any amendments initialed, Pool Compliance
- Add to BDM Spreadsheet under signed listing and add to either Live, Upcoming Takeover or Closed Business.
- Update Teams with listing
- Update Appraisal outcome in Renet
- Update client's contact details in renet and change category to 'Coronis Landlord'
- Send Termination Letter to Agent if property is tenanted
- Have the owner send termination if the property is vacant.
- Assign in Renet 'BDM Client Care Call Task Trail'
- Send Welcome Email to Client and cc property manager
- Assign Property Manager with calendar note to call the new owner within 24 hours and see the property
- Complete the change of address for water, rates, Body Corporate

Add an item

Vacant Property Delete

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- Pre live discussion with PM to check price etc
- Pick up keys
- Arrange Signboard
- Coming to the Market Facebook Post

- Take 'Pleased' Let Photo
- Arrange Photos
- Pre-Live Check on whether there's been any market changes on realestate.com.au etc.
- Add Renet Live Listing with features, price & description
- Send Post Live Handover Email to owner
- 24 Update Email
- 7 Day checkin
- 14 Day Checkin
- 21 Checkin - Call
- 28 Checkin - Call

Add an item

Leased Vacant Property Delete

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- Thank you & Congratulations Email to owner with Testimonial request
- Email admin to remove sign
- Post pleased brochure to Facebook with testimonial and email Emily with boosting
- Change the property over to Closed Business in the BDM Spreadsheet

Add an item

Let Takeover Delete

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- Add Calendar Reminder for collection of management pack and invite assigned PM
- On day of collection - Send Welcome to the Family email and ask for testimonial
- Update the BDM Spedsheet to 'Closed Business'
- Post on Facebook 'Another Client Chose Coronis' with testimonial

Add an item

CLOSED Delete

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- CLOSED

Add an item

 Activity

Show Details