



FirstService
RESIDENTIAL



Achieving Association Excellence: **The Keys to a Successful Manager**

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This guide reviews
the components that
lead to proficient and
effective association
managers.

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The success of a community is, to a large degree, dependent on the effectiveness of your association manager — the operational expertise, professionalism, communication skills and relationship management abilities they consistently exhibit when working with you and your board. These are by-products of a well-conceived professional development program that only an experienced association management company could create and offer — one that ensures the continuous improvement of the managers it places in the communities it serves. As a board member, you should expect to regularly experience these competencies as they are the tangible traits of a talented and successful association manager.

In this guide, we'll review the components that develop proficient and effective association managers: recruiting, training, support services, tools and technology. With these in place, your association manager will be more effective in areas that the role demands. A great association management company understands this and will set its associates up for success by identifying them through robust recruiting techniques, offering comprehensive and ongoing training, providing a diverse set of readily accessible support services and the tools and advanced technologies that association management excellence requires.



Robust Recruiting

Ensuring the competency of an association manager begins with identifying and acquiring top-notch talent. This is best accomplished by developing a pipeline of talented professionals through sourcing resumes from online postings, LinkedIn and recruiting agencies, referrals from employees and networking with people in the industry.

Successful recruiters and hiring managers are trained in sourcing and reviewing resumes, behavior-based interviewing, and pre-employment inquiries and decision-making. The interview process typically begins with a phone screen from an in-house corporate recruiter, then moves to a series of pre-employment assessments that include aptitude, personality and skills tests and ends with a panel interview.

The behavioral-based interview (BBI) technique is an especially effective tool as it improves an employer's chance of hiring the right employee by nearly 50%. The questions target specific behaviors in certain situations needed to be successful in the role.

"When you do behavioral-based interviewing, it involves taking real-life examples in terms of how a candidate handled certain situations in the past, and that predicts

how they're going to handle similar situations in the future," said Amy Mathieson, executive vice president, property operations at FirstService Residential. "With this approach, we get fewer philosophical answers and more that reflect practical experience, so we can better gauge whether a candidate is the right fit."

Panel interviews are also effective because they ensure all the right people are meeting these qualified applicants and that both the interview and the hiring decision are collaborative processes. Candidates should then be matched with managers who will ensure their success through compatible personalities and training initiatives. It's important that people are assigned to the right teams and communities to not only fully utilize their knowledge and experience, but also to make a difference every day.

"An association management company should set their communities up for success by being thoughtful about placing the right person at the right property. To do this, they may conduct formal personality and compatibility assessments with external candidates and thoroughly evaluate internal candidates to know when and where they should move into a particular role," said Jesse DiGiovanni, vice president, human resources at FirstService Residential.



Association Manager Training

Training is much more than coursework and classes. In the association management world, it should begin with a thorough onboarding process for managers that includes ongoing education throughout their career. Your management company should also give them opportunities to further develop and fine-tune their acquired skills through workshops and industry certifications.

Onboarding for Success

The best way to set up new association managers for success is by having an in-depth onboarding program that allows them to ramp up quickly. During their first few weeks on the job, association managers should go through a comprehensive program that includes in-classroom and online training where they learn about the company's values, service standards, best practices, the customer experience, financials, running effective board meetings and training on software programs.

When you partner with an association management company that has a robust onboarding program, your community benefits because your new manager will spend less time being reactive and more time being proactive when it comes to making improvements that will enhance your board and resident experience.

At FirstService Residential, all new managers are required to participate in our Community Management Development Program. This

comprehensive training program includes four modules, each to be completed within a 30-day period, that provide basic knowledge in the five main areas of an association manager's responsibility: board relations, property management, property services, people management and financial management.

"In addition to our onboarding program, we help our managers create an internal network of professional peers and subject-matter experts, and train them to use various resources that enable them to get business done effectively and efficiently," said Amy Sanchez, president at FirstService Residential.

Ongoing Educational Opportunities

A successful association manager should remain open to learning even after they've been fully onboarded. Your association management company should provide opportunities for managers to further their education and training.

Encourage your manager to take advantage of ongoing education and training opportunities offered by your association management company. As your manager's knowledge increases, so will their ability to better support your board and community. They'll be able to answer questions faster, solve problems more efficiently and manage various aspects of the community more effectively.

FirstService Residential association managers have access to FirstService Residential University, an online learning portal that includes more than 150 courses, videos, books, custom-built content and podcasts, which help them improve skills or acquire new ones in a variety of areas of interest, such as finance, leadership, communication or customer service.

Career Growth Opportunities

Another component of an association manager's success is the ability to stay on top of their game, improve their earning potential and accelerate their progress through career growth opportunities. For example, there are several professional organizations that offer certifications. Regardless, managers can earn these certifications to stay sharp and competitive:

- » Accredited Residential Manager (ARM).
- » Association Management Specialist (AMS).
- » Certified Property Manager (CPM).
- » Professional Community Association Manager (PCAM).
- » Large Scale Manager (LSM).
- » Accredited Association Management Company (AAMC).
- » Certified Manager of Community Associations (CMCA).

These certifications can contribute to their ongoing education by offering another level of experience and proficiency beyond the training they receive internally. Check with your association management company to see which, if any, of these certifications are required or available in your area and if your association manager has or can obtain them.

At FirstService Residential, we also offer internal, supplemental career development programs and workshops to foster a greater understanding of all facets of the manager's role and promote professional growth.





Support Structure and Services

For an association manager to flourish on the job, they must be well supported by the association management company's resources, both organizational and technical.

Senior Leadership

Just as your association manager supports you and your community, senior leaders must support the association manager. Working together, these senior leaders:

- » Ensure association managers understand their roles and responsibilities.
- » Manage their performance.
- » Offer additional support to the board of directors.
- » Provide strategic guidance due to their collaboration with other regional leaders and multiple property oversight.
- » Share best practices and gain different perspectives given their collective experience.

At FirstService Residential, the regional director's role is critical to ensuring the continuous improvement of our association managers. As the manager's supervisor, the

regional director also engages with the board, supporting them with another direct line of communication.

"The regional directors' responsibilities are detailed in our FirstService Residential 'Playbook' which outlines how to nurture the manager's development, provide valuable feedback, manage their performance and maintain a constant relationship with the board," DiGiovanni added.

Customer Service Center

Having a dedicated, around-the-clock, call-in resource helps support your manager by relieving them from simple day-to-day functions — allowing them extra time to focus on board-related tasks and needs. It also provides residents instant access to specific information and allowing for quick responses to questions and requests concerning payments/collections, account balances, violations, document requests, access to common areas and emergencies.

FirstService Residential's U.S.-based Customer Care Center is staffed with associates of FirstService Residential. It is also multi-lingual and operates 24/7/365.

Specialized Support

While your association manager wears many hats, certain situations require much more specific expertise. Specialized support in areas such as human resources, information technology and finance/accounting enables your manager to:

- » Provide your board with accurate and timely financial reports.
- » Ensure your community's technology runs smoothly and your private data is secure.
- » Invest your reserve funds to maximize return and minimize risk.
- » Leverage buying power to provide your community with the most valuable options for everything from insurance to internet/cable to landscaping.

By tapping into a comprehensive system of support, your manager can focus on managing their staff, building great relationships and working more effectively with your board to enhance your community.

For example, one of the primary support services our association managers can access is FirstService Financial, our banking and insurance affiliate. FirstService Financial's experts can offer sound guidance that can help association managers and boards better manage communities' budgets, lending opportunities, take advantage of the most competitive insurance premiums available, increase investment returns and improve financial gains.

DiGiovanni adds this perspective: "Oftentimes an association manager needs to have another resource behind them to help them identify opportunities for their community to invest smarter, cut costs or leverage better vendors. FirstService Financial arms our association managers with the knowledge that's necessary to spot those opportunities for improvement."



Advanced Tools & Technology



In today's digital world, association managers must have access to advanced technology and innovative tools to speed up and streamline processes, provide timely responses and gather information quickly and efficiently.

History of the Community and Board

Each condominium or homeowners association is different, and it's important that those nuances are recorded somewhere for your association manager and staff to access. This type of information includes:

- » Board and resident dynamics.
- » Past board meeting minutes.
- » Community governance and bylaws.
- » Financial documents.

When your manager is aware of past and present interpersonal dynamics, the current status of issues and previous resolutions, they can collaborate more effectively with your board to help achieve your community's vision, improve your resident experience and increase property values.

At FirstService Residential, this recorded information is inherent to our community onboarding process so

that new association managers can hit the ground running. They work from a detailed onboarding checklist that addresses people dynamics, the financial setup of the community, administrative procedures and vendor relationships.

"We utilize internal standard operating procedures to pass on critical community information when new people enter the picture. These documents capture all the 'institutional knowledge' a manager has about a particular association and board — ranging from simple things like what the board likes to eat for dinner at their monthly meetings, all the way up to if the board is required to review CPA bids every year or not," said Jennifer Fischel, vice president, operations at FirstService Residential.

Community Documentation

It's inevitable that your manager will need guidance when situations or projects arise that they aren't familiar with. To help them, a great association management company will ensure they have easy access to a knowledge base created specifically for their role that includes items such as standard operating procedures, training videos/ documents, checklists and work process guides. This empowers managers to be proactive when issues arise and solve problems more quickly.

FirstService Residential managers are issued a Community Information Handbook when they're assigned to a property that contains comprehensive information about the association's policies and procedures. It's used as a day-to-day guide for the successful operation of the community.

Technological Solutions

Given the complexities of community management, a successful manager's support system would not be complete without specialized technology that facilitates their daily responsibilities.

"With technology and paperless systems in place, an association manager can be just as effective at home or on the road, as they are in the office," said Michael Francolla, regional director at FirstService Residential. "These capabilities came in handy when COVID-19 hit. We were able to react quickly to it with minimal community management interruption."

In addition, to truly excel at the job, an association manager should have access to a centralized technology hub that offers them the ability to:

- » Communicate easily and securely with residents, board members, vendors, the management team and onsite staff.
- » Send alerts and emergency messages to some or all board members and residents via automated phone calls or emails.
- » Access community information and documents.
- » Review resident accounts and outstanding requests.
- » Track vendor work status and payments.

Our proprietary software, FirstService Residential Connect™, features an associate portal that allows the association management team to send email blasts, track expenses, schedule maintenance and report violations. With all this information at their fingertips, our managers can be completely in tune with the community, answer questions quickly and provide knowledgeable feedback.





After reading this guide, you can better evaluate an association manager's abilities in terms of how they were recruited, the training they receive, the structure and services that support them, as well as the tools and technology that are available to them.

Is your community getting the most effective association manager they deserve? If you're not sure, [contact FirstService Residential](#) today.



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About FirstService Residential

FirstService Residential is North America's property management leader, partnering with 8,500 communities across the U.S. and Canada. HOAs, community associations, condos and strata corporations rely on our extensive experience, resources and local expertise to maximize their property values and enhance their residents' lifestyles. Dedicated to making a difference, every day, we go above and beyond to deliver exceptional service.

FirstService Residential is a subsidiary of FirstService Corporation, a North American leader in the property services sector. Find out how we can help your community thrive. Visit www.fsresidential.com.

