



FirstService
RESIDENTIAL



Achieving Association Excellence: **MANAGER SUPPORT CHECKLIST**

Your association manager's operational expertise, professionalism, communication skills and relationship management abilities are further enhanced by the professional development program that is provided to them by your association management company.

There are several key components of support that create effective and proficient association managers: comprehensive training, strong support structure, specialized services, innovative tools and technology.

Use this checklist to assess the level of support your manager is receiving and to ensure they have the resources they need to set your association up for success.

COMPREHENSIVE TRAINING

Onboarding Program

Includes in-classroom and online training where managers learn about corporate values, service standards, best practices, financial management, software programs and board meeting management.

Industry-Related Education

Expands your manager's knowledge base in areas such as finance, leadership, communication and customer service to further their training and development.

Career Development

Helps your manager accelerate their progress by earning certifications from industry associations, while also taking advantage of internal development programs.

SUPPORT STRUCTURE & SERVICES

Senior Leadership

Ensures your manager fully understands their role and responsibilities, receives ongoing coaching, offers additional board support and can access best practices.

Customer Care Center

Relieves your manager from simple day-to-day functions and frees up their time to focus on board-related needs. It also supports your manager by providing residents with a dedicated, 24/7, call-in resource that offers quick answers to questions and requests concerning payments and collections, account balances, violations, document requests, access to common areas and emergencies.

Specialized Support

HR, IT and finance/accounting support that will ensure technology is running smoothly, enable your manager to provide accurate payroll information, invest reserve funds to maximize returns and minimize risk, and leverage the management company's buying power.

TOOLS & TECHNOLOGY

History of the Community and Board

Documented information about your community's board and resident dynamics, past board meeting minutes, community governance, bylaws and financial records.

Community Documentation

A knowledge base created specifically for your manager that includes items such as standard operating procedures, training videos/documents, checklists and work process guides.

Technology Solutions

Specialized tools that facilitate your manager's daily responsibilities, such as FirstService Residential Connect™, including an online document ordering system, accounting software, an online bill payment system and a centralized technology hub.