MULTIFAMILY MANAGEMENT / 01

MAP THE PORTFOLIO AND AUTHORITY

Describe Portfolio A without addresses, applicant or resident identities, accounts, credentials, incidents or private records.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Portfolio A / neutral label / property and unit counts

Building types / common-area categories / neutral labels

Owner objectives / service priorities / no private facts

Manager authority requested / decisions to delegate

Owner-reserved decisions / approval contacts by role

Existing onsite staff, vendors and systems / role labels only

Preparation only. Not brokerage, agency, fair-housing, screening, leasing, notice, accommodation, occupancy, rent, deposit, eviction, maintenance, licensing, accounting, tax, privacy, insurance, contract or legal advice. Keep property, applicant, resident, account, credential, incident and private-record details out.

MULTIFAMILY MANAGEMENT / 02

DEFINE OPERATIONS, REPORTING AND TRANSITION

Ask the provider to document channels and responsibilities; keep housing, screening and legal decisions with qualified reviewers.

Resident communication and escalation channels

Maintenance intake, after-hours and vendor-dispatch workflow

Common-area, recurring work and onsite staffing roles

Operating, financial and exception reports / definitions

Onboarding, systems access and private-record handoff

Exit transition, records return and vendor continuity

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MULTIFAMILY MANAGEMENT / 03

CHECK PROPOSAL READINESS

Tick what is organized. These checks do not authorize screening, leasing, notices, accommodations or resident decisions.

- [ ] Every provider receives the same Portfolio A brief
- [ ] Addresses, resident data, accounts and incidents remain private
- [ ] Delegated and owner-reserved decisions are separated
- [ ] Housing and screening decisions remain qualified-review items
- [ ] Resident and after-hours channels are defined
- [ ] Maintenance, vendors, common areas and staffing are assigned
- [ ] Reports use written definitions and exception ownership
- [ ] Onboarding, records return and exit handoffs are visible

Open owner-authority or approval question

Unassigned resident, maintenance, vendor or after-hours role

Missing report, onboarding, data or exit-handoff detail

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MULTIFAMILY MANAGEMENT / 04

QUESTIONS FOR THE MULTIFAMILY MANAGER

Record the answer and where it appears in the proposal or management documents.

Team: what experience, staffing and portfolio assignment are proposed?

Authority: which decisions are delegated, reserved or escalated?

Residents: how are communications, maintenance and after-hours issues routed?

Operations: how are onsite staff, vendors and common areas coordinated?

Reporting: what reports, definitions and exceptions are included?

Transition: how are systems, records, vendors and exit handoff managed?

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MULTIFAMILY MANAGEMENT / 05

COMPARE THE SAME PORTFOLIO A BRIEF

Use Provider A and B. Clarify unlike authority, staffing, workflow or reporting assumptions before comparing proposals.

Provider A / B / proposal dates / shared Portfolio A brief

Staffing, delegated authority and owner approvals - A / B

Resident, maintenance, vendor and after-hours workflows - A / B

Reporting, transition, records, exclusions and written terms - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai only if you choose, then start a Property Management request. Share the same non-sensitive Portfolio A brief so participating pros can compete with proposals. Compare staffing, authority, resident and maintenance workflows, vendor coordination, reporting, transition, exclusions, written terms and fit. A private portfolio, systems, records and qualified-adviser review may be needed before a final proposal.

One request. Every pro's best offer.

Start a request

Participation varies. A private portfolio, systems, records and qualified-adviser review may be needed before a final proposal.

Planning guide: https://www.pickyourpro.ai/services/property-management/multifamily-properties

HUD: Housing Discrimination Under the Fair Housing Act (official reference)

CFPB: What Is a Tenant Screening Report? (official reference)

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