



Latchel's Preventive Maintenance Plan eBook

Building a Robust Preventative
Maintenance Plan



Content

Should I Read This eBook?	3
How to Get the Most From This eBook	5
Why Build a Preventative Maintenance Plan?	7
Moving from Reactive to Proactive Maintenance	8
Moving from Reactive to Proactive Checklist	10
Respond, Don't React Getting Reactive Maintenance Under Control	11
Preventative Maintenance Plan Readiness Scorecard	14
The 80/20 Rule at Work: Find the Properties that Generate the Most Maintenance	16
Breaking the Cycle: Stop Creating Needy Properties	20
Template: Unit Turnover Checklist	22
Template: New Property Intake – Assessing Maintenance Concerns	24
Template: Minimum Standard of Livability & Repair	26
Clean Up Your Bad Properties	30
Difficult Conversations: Correct or Offboard Problematic Owners	32
Sample Script: Having a Difficult Conversation with a Problematic Owner	34
Template: Owner/Manager Relationship Expectations	37
Proper Preventative Maintenance: Avoiding the "Okay" Property Trap	38
Aim for "Reliable", Not "Luxury"	39
Build Your First Preventative Maintenance Program: Step-by-Step Guide	41
Sample Collection of Preventative Maintenance Measures	42
Master Your Preventative Maintenance Plan: Art & Science	47
About Latchel	50

Should I Read This eBook?

Welcome to "Building a Robust Preventative Maintenance Plan," an indispensable eBook designed specifically for professional property managers. Whether you oversee a handful of units or manage a sprawling portfolio of properties, this book provides a wealth of knowledge, practical strategies, and essential tools to enhance your maintenance operations and maximize the longevity of your assets.

Written in an educational, friendly, and conversational style, this eBook combines informative content with a touch of humor to keep you engaged throughout. With a focus on factual accuracy, comprehensive coverage, and practical application, it equips you with the necessary tools to excel in your role and drive superior results.



This eBook is tailored to address the needs of property managers who operate in two primary scenarios: those who have clients that include property owners and residents, and owner-operators who manage their own properties. Recognizing the wide range of portfolios these professionals oversee, from just a few units to tens of thousands, this book offers valuable insights applicable to every scale.

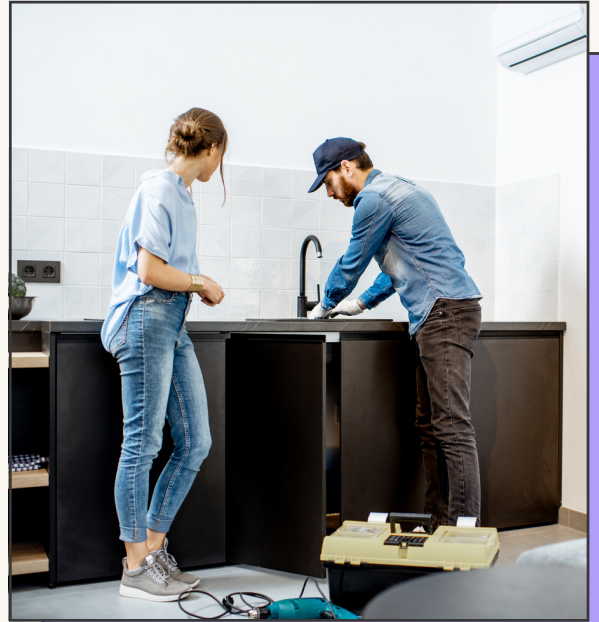
Should I Read This eBook?

Central to this eBook is the process of building a preventative maintenance plan. It outlines a step-by-step framework that enables you to develop a tailored plan to proactively address potential issues, reduce reactive maintenance, and increase the lifespan of your assets. To facilitate implementation, the book includes numerous templates and checklists that can be easily customized to fit your specific needs.

Furthermore, "Building a Robust Preventative Maintenance Plan" emphasizes the importance of sustaining and improving your maintenance plan. It provides strategies for tracking performance, measuring the plan's effectiveness, and making continuous improvements based on real-time data and feedback.

Whether you're a seasoned property manager seeking to optimize your existing maintenance practices or a newcomer looking to establish a solid foundation, this eBook is an invaluable resource. By following the guidance within these pages, you'll enhance your property management skills, bolster the value of your properties, and ensure the satisfaction of both property owners and residents.

Read "Building a Robust Preventative Maintenance Plan" today and equip yourself with the knowledge and tools necessary to thrive in the challenging world of property management. Your properties and clients will thank you for it!



How to Get the Most From This eBook

For many property managers, the struggle between reactive and preventative maintenance is all too familiar. If you find yourself constantly caught up in a whirlwind of urgent repairs, leaving no time to proactively prevent issues, you're not alone. This eBook addresses this common dilemma head-on and provides actionable steps to help you break free from the cycle of reactive maintenance. Whether you're overwhelmed or seeking targeted solutions, this eBook is designed to cater to your specific needs.

The Common Situation

Picture this: a leaking faucet in one unit, a malfunctioning HVAC system in another, and a tenant complaining about a broken light fixture down the hall. Sound familiar? The constant barrage of urgent maintenance requests can leave property managers feeling overwhelmed and unable to devote time and resources to preventative measures. But fear not, as this eBook is precisely tailored to address your specific situation.



The eBook for You

If you're currently experiencing the overwhelm of reactive maintenance, this eBook is your lifeline. It provides a comprehensive roadmap to identify your biggest problem areas, halt the creation of new issues, and regain control over your maintenance operations. By implementing the principles outlined in this eBook, you'll be able to turn the tide and pave the way towards a proactive approach.

Skip Around to Your Needs

For those fortunate enough to not be overwhelmed by reactive maintenance, you have the flexibility to focus on the chapters and templates that directly apply to your situation. You can skip around and dive into the specific areas that will enhance your existing processes and elevate your property management game.

How to Get the Most From This eBook

Combatting the Problem

To combat the overwhelm of reactive maintenance and lay the foundation for a solid preventative maintenance plan, this eBook will guide you through the essential steps. You'll learn how to identify your biggest problem areas, analyze maintenance trends and root causes, and develop strategies to prioritize and address issues effectively. By following the guidance provided, you'll be able to regain control, allocate resources efficiently, and shift towards a proactive maintenance approach.

We understand that executing a preventative maintenance plan can be incredibly challenging when you're overwhelmed by the constant influx of emergencies and urgent repairs. It's only natural that routine and repeated tasks may take a backseat as you prioritize immediate needs. However, it's important to remember that by investing time and effort into establishing a preventative maintenance plan, you can actually alleviate some of that overwhelm in the long run. The key lies in finding a balance between addressing immediate issues and allocating resources to proactively prevent future problems. In the following chapters, we will provide you with practical strategies and tools to help you navigate this delicate balance, ensuring that routine maintenance becomes an integral part of your operations and aids in reducing emergencies over time.



Why Build a Preventative Maintenance Plan?

Preventing problems before they occur is a fundamental principle of effective property management. Here are the key reasons why investing time and effort into building a preventative maintenance plan is crucial:



1. Avoid Costly Repairs:

Do you know what's more expensive than fixing a broken pipe? Fixing a broken pipe that has caused extensive water damage, disrupted tenants, and requires emergency repairs. A preventative maintenance plan helps you identify and address potential issues early on, mitigating the risk of costly repairs and minimizing disruptions to your tenants.



2. Extend Asset Lifespan:

Imagine your properties as superheroes, fighting the battle against wear and tear. With a preventative maintenance plan, you become their trusty sidekick, equipped with tools and strategies to protect them from premature aging. Regular inspections, timely repairs, and preventive measures ensure that your assets remain in peak condition, extending their lifespan and maximizing their value.



3. Enhance Tenant Satisfaction:

Happy tenants are like unicorns – they're magical, elusive, and bring good fortune. By proactively addressing maintenance issues, you create a pleasant living environment that fosters tenant satisfaction. Regularly scheduled inspections, responsive maintenance services, and well-maintained common areas make your properties more desirable, attracting and retaining quality tenants.

Do's

1. Conduct regular property inspections to identify maintenance needs and potential issues.
2. Create a schedule for routine maintenance tasks, including inspections, servicing, and preventive measures.
3. Implement a system for tracking maintenance activities, ensuring tasks are completed on time, and documenting any necessary repairs or improvements.

Don'ts

1. Neglect preventive measures, assuming everything will be fine until a problem arises.
2. Rely solely on reactive maintenance, waiting for tenant complaints before taking action.
3. Overlook the importance of data and analysis in identifying maintenance trends and patterns.

Moving from Reactive to Proactive Maintenance

In this chapter, we will explore the various approaches that contribute to this objective, highlighting the differences between reactive maintenance, targeted maintenance, inspections, unit turnovers, and preventative maintenance. By understanding how each approach plays a unique role in cost reduction, you can develop a comprehensive strategy to optimize your maintenance operations and maximize efficiency.

Reactive Maintenance

Reactive maintenance is the fire-fighting approach, where repairs and maintenance tasks are carried out in response to immediate needs or emergencies. While it may be necessary in certain situations, relying solely on reactive maintenance can lead to higher costs in the long run. Emergency repairs often come with premium prices, and delays in addressing issues can exacerbate problems and result in more extensive damage.



Targeted Maintenance

Targeted maintenance involves prioritizing properties or systems that are known to have recurring issues or require specialized attention. By focusing efforts on these specific areas, property managers can address the root causes of problems and implement solutions that reduce overall maintenance expenses. Targeted maintenance helps prevent the escalation of issues, leading to more cost-effective and efficient long-term operations.

Inspections

Regular inspections are proactive measures designed to identify potential problems before they escalate into larger issues. By conducting thorough inspections, property managers can detect maintenance needs, identify areas for improvement, and address small problems before they become major expenses. Inspections provide valuable insights into the condition of properties, enabling early intervention and more accurate maintenance planning.

Moving from Reactive to Proactive Maintenance

Unit Turnovers

Unit turnovers involve upgrading and preparing rental units to meet a standardized condition before new tenants move in. This process ensures that each unit is well-maintained, reducing the likelihood of immediate maintenance issues arising for new tenants. By investing in unit turnovers and bringing properties to a higher standard, property managers can minimize reactive maintenance demands and enhance tenant satisfaction.

Preventative Maintenance

Preventative maintenance is the cornerstone of proactive property management. It involves planned and scheduled service and maintenance tasks based on seasonal considerations, manufacturers' recommendations, and the lifespan of appliances or systems. By adhering to a preventative maintenance plan, property managers can identify potential issues, perform routine servicing, and implement necessary repairs before problems arise. This approach not only reduces overall maintenance expenses but also extends the lifespan of assets and minimizes disruptions to tenants.



The Synergy of Proactive Approaches

While each of these approaches—reactive maintenance, targeted maintenance, inspections, unit turnovers, and preventative maintenance—plays a distinct role, they are all interconnected and contribute to reducing overall maintenance expenses. By incorporating a comprehensive strategy that combines these approaches, property managers can effectively allocate resources, mitigate costly emergencies, optimize maintenance operations, and improve the financial performance of their properties.

By embracing a proactive mindset and implementing these various approaches, property managers can establish a more cost-effective and sustainable maintenance plan. In the following chapters, we will dive deeper into each of these topics, providing you with practical insights, templates, and checklists to guide your journey towards reducing overall maintenance expenses and achieving long-term success in property management.

Moving from Reactive to Proactive Checklist

This checklist outlines the steps necessary to move from a chaotic reactive maintenance process to an orderly proactive process. This also serves as an outline for the remainder of the eBook.

- ☐ Get unplanned work under control.
- ☐ Identify your “Great” “Okay” and “Bad” properties that generate the most work.
- ☐ Stop generating new “Bad” properties via better unit turnovers and new unit acquisition.
- ☐ Move “Bad” properties to “Okay” (or “Good”).
 - ☐ Set your minimum livability and repair standard.
 - ☐ Begin regular, annual inspections.
 - ☐ Follow-up on inspection results and bring homes to your standard.
- ☐ Plan to correct or offboard problematic owners.
 - ☐ Identify owner behaviors that lead to “Bad” properties.
 - ☐ Stop accepting new difficult owners.
- ☐ Convert “Okay” properties to “Good”.
 - ☐ Implement a preventative maintenance program.
 - ☐ Implement a seasonal maintenance program.
- ☐ Master your preventative maintenance plan.
 - ☐ Harmonize units turns, inspections, and preventative maintenance.
 - ☐ Master maintenance metrics.
 - ☐ Maintain your preventative maintenance program.

Respond, Don't React: Getting Reactive Maintenance Under Control

Welcome to the chapter dedicated to gaining control over reactive maintenance. In this fast-paced world of property management, it's all too common to find ourselves constantly reacting to urgent issues rather than proactively addressing them. In this chapter, we'll explore the importance of bringing reactive maintenance under control and the various reasons why it often feels overwhelming. So grab a cup of coffee, put on your problem-solving hat, and let's dive in!

Picture this: you're trying to maintain an extra program (like a preventative maintenance plan!). But the constant influx of reactive maintenance issues keeps diverting your attention. Sound familiar? It's essential to understand why getting reactive maintenance under control is crucial for your success. By doing so, you can free up valuable time and resources, allowing you to focus on preventive measures and overall improvement.

You're juggling multiple balls, each representing a different aspect of property management. If all you're doing is reacting to the latest fire, how can you possibly maintain that extra program or focus on other essential tasks? It's like trying to juggle while riding a unicycle on a tightrope without a safety net – it's a disaster waiting to happen!



Respond, Don't React Getting Reactive Maintenance Under Control

Now, let's explore the reasons why reactive maintenance often spirals out of control:



1. Lack of Defined Maintenance Process:

Sometimes, property managers operate without a structured maintenance process. Instead, each person is expected to “employ common sense” or “do what you think is right.” Without a defined maintenance process in place, you're relying solely on the heroic efforts of your team members. While their dedication is commendable, it's time to establish a clear framework for handling maintenance issues.

2. Undefined Roles and Responsibilities:

When there's no clarity about who should handle what, tasks fall through the cracks. Without defined roles and responsibilities, it's akin to a game of hot potato, with issues getting tossed from one person or team to another, never finding a resolution.

3. Absence of an Effective Handoff Process:

Even if roles and responsibilities are defined, a smooth handoff process is vital. Without one, critical information and progress made on resolving an issue can get lost in the handover, leading to delays and frustration. Problems move from one person or team to another without clear communication or accountability. It's time to establish seamless transitions, ensuring the baton is passed smoothly and efficiently.

4. Lack of Standardized Maintenance Request Management:

Ever find yourself scrambling to catch maintenance requests from various sources? It's like trying to catch a handful of marbles before they hit the ground – it's nearly impossible! Defining and streamlining how maintenance requests should be received is the key to avoiding chaos and ensuring nothing slips through the cracks.

5. Unclear Vendor Engagement Guidelines:

When vendors are left to their own devices it can lead to inconsistencies and delays in addressing maintenance issues. You're subject to abiding by their processes and preferences, not yours. You become a passenger on their rollercoaster ride.

Respond, Don't React Getting Reactive Maintenance Under Control

6. Insufficient Vendor Network:

If you don't have enough reliable vendors, either in certain regions or with specific skills, you'll struggle to provide timely maintenance solutions, leaving both tenants and owners frustrated.

7. Lack of Defined Processes for Common Situations:

Ordering materials, approving estimates, managing warranties, and dealing with invoicing delays are everyday challenges. Without clearly defined and tracked processes for these situations, you risk wasting time and resources.



8. Failure to Address Maintenance Root Causes:

Reactive maintenance becomes a never-ending cycle when the root causes of issues are not identified and resolved. It's like mopping the floor without fixing the leaky pipe above it – a futile exercise in maintaining the status quo.

If you're finding yourself nodding along to issues 1-7, you may not be ready for building a Preventative Maintenance Plan. Implementing a preventative maintenance plan is like laying a strong foundation for your property management operations. However, if you find yourself struggling with one of the common reasons why reactive maintenance feels unruly, it's essential to address and solidify your core processes first. Think of it as preparing the ground before building a house. Without a well-defined maintenance process, unclear vendor engagement guidelines, or insufficient vendor network, attempting to implement a preventative maintenance plan may be like building on shaky ground. By focusing on establishing robust core processes, you can create a stable framework that will support the successful implementation of a preventative maintenance strategy, setting you up for long-term success and smoother operations. Remember, a solid foundation is key to building a resilient and proactive property management approach.

If, on the other hand, your biggest problem is you aren't addressing maintenance root causes: get working on that preventative maintenance plan asap!

Preventative Maintenance Plan Readiness Scorecard



Take the following quiz to determine if your organization is ready to build a preventative maintenance plan or if you should first focus your effort on reactive maintenance fundamentals.

If you have an overall positive score, you're probably ready for a preventative maintenance program! Otherwise, work on improving the things that contributed the most to your negative scores. You can also take the quiz by clicking the button below:

[Take Quiz](#)

Preventative Maintenance Plan Readiness Scorecard

#	Statement	Strongly Disagree	Disagree	Agree	Strongly Agree
1	We have a documented process for handling maintenance.				
2	We don't need to write down our process, running maintenance is "common sense".				
3	Every role has a job description and people know their responsibilities.				
4	We don't need job descriptions. People should "do the right thing" and figure it out.				
5	Different teams know how to work together to solve a problem.				
6	Whenever something goes wrong it feels like everyone is trying to pass the buck.				
7	We only accept maintenance requests in specific, approved ways.				
8	Maintenance falls through the cracks because my team forgets the request or never wrote down the request.				
9	We have the vendors we need in most areas and trades.				
10	We MUST adapt to how our vendors want to work.				

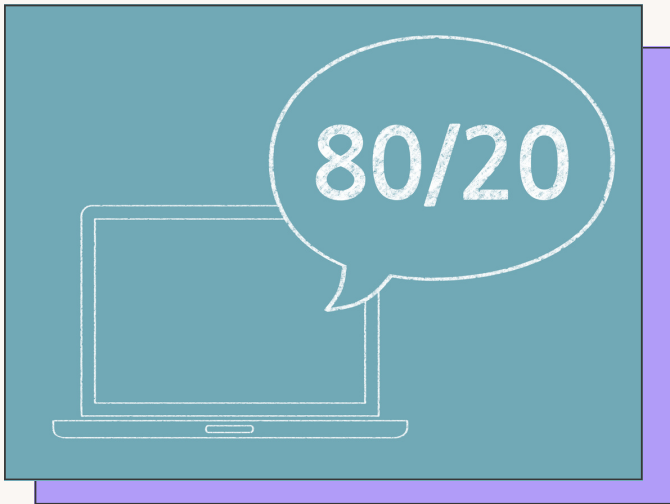
Scoring:

Start with 10 points. For every odd question, add or subtract the following to your score:

Strongly Disagree: -2, Disagree: -1, Agree: +0, Strongly Agree: +2

For every even question, add or subtract the following to your score: Strongly Disagree: +5, Disagree: +0, Agree: -3, Strongly Agree: -10

The 80/20 Rule at Work: Find the Properties that Generate the Most Maintenance



As a professional property manager, you know that maintenance requests can sometimes feel overwhelming. But what if there was a way to identify the properties that generate the most work, allowing you to focus your efforts strategically? Enter the 80/20 rule, a powerful principle that can help you prioritize and optimize your maintenance efforts. In this chapter, we'll explore how the 80/20 rule applies to property management and how you can leverage it to work smarter, not harder.

Understanding the 80/20 Rule

You may have heard of the 80/20 rule before, also known as the Pareto principle. It states that roughly 80% of the effects come from 20% of the causes. In the context of property management, this means that a significant portion of your maintenance workload is driven by a small number of properties. At Latchel, we've observed that it's even more concentrated than that. In fact, we've found that 80% of maintenance requests often stem from just 15% of the properties. In some extreme cases, this ratio can be as high as 90/10.

Identifying the High-Maintenance Properties

To uncover which properties are the main culprits behind your maintenance workload, you can take a list of all unplanned maintenance requests from the past year. By examining the count of requests per property, you can easily identify those that generate the most work. Platforms like Latchel provide built-in Analytics tools that simplify this process, giving you valuable insights at your fingertips.

The 80/20 Rule at Work: Find the Properties that Generate the Most Maintenance

Categorizing Properties

Once you have the data, it's time to categorize the properties into three rough categories: "Good," "Okay," and "Bad." This initial categorization serves as a starting point for further analysis. Sometimes there are clear distinctions when you sort the data from most to least maintenance requests. Sometimes it feels like there's a smooth trend without a clear cutoff between "Okay" and "Bad". The specific details and cutoff aren't important—it's okay to be arbitrary here. Remember, the goal here is simply identification, and the action plan to address these properties will come later. Having this knowledge is an important foundation for making informed decisions.

Applying the 80/20 Rule to Other Aspects of Your Business

The power of the 80/20 rule extends beyond maintenance requests. You can also apply this principle to other areas of your property management business. Consider your preferred vendors—is there a small subset that consistently delivers the best results? Are there specific maintenance expenses that take up a significant portion of your budget? By pinpointing the areas where the 80/20 rule applies, you can allocate your time, effort, and resources more effectively.

Understanding the 80/20 rule and its impact on your property management operations is a game-changer. By identifying the properties that generate the most work, you can prioritize your efforts and develop targeted strategies to address maintenance challenges. Remember, the initial step is simply to recognize the properties with the highest maintenance demands, while the action plan comes later. Stay tuned for the next chapter, where we'll delve deeper into turning this knowledge into practical solutions that will streamline your property management processes.



Size & Situation Specific Guidance

Owner-Operators	Analyze the maintenance data for your properties regularly to identify the top 15% causing the most work. Focus your efforts on these properties, such as implementing preventive measures and regular inspections.
Third-Party Property Managers	Collaborate closely with property owners to understand their priorities. Use the 80/20 rule to identify the properties that require the most attention and develop tailored strategies to address their maintenance needs. Communicate regularly with owners about the impact of these properties on overall maintenance efforts and work together to improve these properties.
Property Management Beginners	Start by establishing a solid foundation of data collection and analysis. Even with a small number of properties, apply the 80/20 rule to identify the high-maintenance ones. This early insight will help you develop efficient maintenance practices and allocate resources effectively as you grow your portfolio.
Small Property Managers	Recognize the importance of transitioning from intuition-based decision-making to data-driven strategies. Utilize property management software with built-in analytics to identify the top 15% of properties generating the most work. Develop systematic processes and prioritize improvements for these properties to optimize maintenance efficiency and scale effectively.
Mid-Sized Managers	Focus on streamlining processes and increasing standardization across your portfolio. Leverage the 80/20 rule to identify the properties driving the majority of maintenance work. Concentrate on establishing consistent protocols, documenting best practices, and implementing automated systems to effectively manage maintenance demands across properties.

Size & Situation Specific Guidance

Large Property Managers	Emphasize standardization and change management within your organization. Utilize the 80/20 rule to identify the properties that require significant resources and create a cross-functional team dedicated to reducing their maintenance request volume. Implement regular performance evaluations, update protocols, and foster collaboration to enhance efficiency and address challenges in standardizing processes across teams.
Very Large Managers	Ensure compliance and change management are a top priority. Leverage the 80/20 rule to identify properties with the highest maintenance demands and establish robust protocols to ensure regulatory compliance. Focus on change management strategies to facilitate the implementation of new processes and technologies, continuously seeking improvement while maintaining defined maintenance practices for a large-scale portfolio.

Breaking the Cycle: Stop Creating Needy Properties

In this chapter, we'll explore the importance of stopping the net inflow of new bad properties and provide practical strategies to transform properties from "Bad" to "Okay" or even "Good." By implementing effective turnover processes and screening new properties, you can prevent the unnecessary maintenance issues and set the stage for positive landlord-tenant relationships. So, let's dive in and discover how to break the cycle and create a portfolio that thrives.



The Power of a Reset

Every time a unit turnover occurs, it presents an opportunity to hit the reset button on a property. Now, a reset doesn't mean magically transforming a Class C property into a Class A property overnight. However, it does offer a chance to elevate a "Bad" property to an "Okay" or "Good" one. By capitalizing on this moment, you can make significant improvements and prevent future maintenance headaches.

Strengthening Your Turnover Checklist

One of the main tools at your disposal for breaking the cycle is a robust unit turnover checklist. It's crucial to ensure that your team addresses all necessary repairs and maintenance tasks before a new resident moves in. After all, you don't want your brand-new tenant to be the one discovering overlooked issues. Strengthening your turnover process not only sets the right tone for the tenant-landlord relationship but also saves your team from being overwhelmed with unplanned work.

Screening New Properties

In addition to fortifying your turnover process, it's essential to screen new properties from potential clients (or when doing acquisitions). When you take over properties, you inherit their existing problems. It's crucial to approach this transition with your eyes wide open. While you may not be able to perform miracles on demand, you can certainly minimize surprises and plan accordingly.

Breaking the Cycle: Stop Creating Needy Properties

Implementing a Property Intake Process

To ensure a smooth transition and mitigate future headaches, it's advisable to establish a property intake process. At a minimum, this process should include conducting inspections at each property within the first three months of taking over management. Ideally, inspections should occur within the first 30 days. By thoroughly assessing the property's condition early on, you can identify any pressing maintenance needs and address them promptly.

Setting Expectations with New Owners

Communication is key when it comes to managing expectations with new owners. It's vital to establish a minimum livability and repair standard for their properties. New owners should be made aware that deferred maintenance not only increases long-term expenses but also makes it challenging to retain good tenants. By setting these expectations upfront, you can work collaboratively with owners to ensure their properties meet the required standards.

Breaking the cycle of creating needy properties is an essential step in building a successful property management portfolio. By focusing on strengthening your turnover processes, screening new properties, implementing a property intake process, and setting clear expectations with owners, you can prevent the accumulation of unnecessary maintenance issues and create a portfolio that thrives. Remember, a little effort in the beginning can go a long way in minimizing future headaches and establishing positive landlord-tenant relationships.



Template: Unit Turnover Checklist

1. General Inspection

- Check for any visible damage or wear and tear in the unit, including walls, ceilings, and floors.
- Comments: _____
- Ensure all windows, doors, and locks are functioning properly.
- Comments: _____
- Verify that light fixtures, outlets, and switches are in working order.
- Comments: _____
- Test heating, ventilation, and air conditioning systems for proper functioning.
- Comments: _____
- Check for any signs of pests or infestations.
- Comments: _____
- Inspect the cleanliness of the unit, including carpets, appliances, and surfaces.
- Comments: _____

2. Repairs and Maintenance

- Address any outstanding maintenance requests from the previous tenant.
- Comments: _____
- Repair or replace any damaged or malfunctioning appliances, fixtures, or equipment.
- Comments: _____
- Ensure all plumbing fixtures, including faucets, toilets, and showers, are in good working condition.
- Comments: _____
- Paint and touch up walls as needed.
- Comments: _____
- Replace or repair any damaged flooring or carpets.
- Comments: _____
- Inspect and clean ventilation systems, including air filters and ducts.
- Comments: _____

Template: Unit Turnover Checklist

3. Utilities and Safety

- Ensure that all utilities, such as water, gas, and electricity, are functioning properly.
- Comments: _____
- Test smoke detectors, carbon monoxide detectors, and fire extinguishers for proper operation.
- Comments: _____
- Check that all emergency exits are clear and accessible.
- Comments: _____
- Verify that the unit meets all safety and building code requirements.
- Comments: _____

4. Cleaning and Presentation

- Thoroughly clean the unit, including all surfaces, appliances, and fixtures.
- Comments: _____
- Remove any debris or personal belongings left by the previous tenant.
- Comments: _____
- Ensure that all areas, including closets, storage spaces, and garages, are clean and organized.
- Comments: _____
- Replace any worn-out or stained curtains or blinds.
- Comments: _____
- Enhance the overall presentation of the unit by staging it with appealing decor and furnishings.
- Comments: _____

5. Documentation and Communication

- Take clear and detailed photographs of the unit before and after the turnover process.
- Document any repairs, maintenance tasks, or improvements made during the turnover.
- Communicate the completion of the turnover to the property owner and provide necessary documentation.

Remember, this is a general template, and you can customize it based on the specific requirements and standards of your properties. Regularly reviewing and updating your turnover checklist will help ensure a smooth and efficient turnover process for each unit.

Template: New Property Intake – Assessing Maintenance Concerns

1. Initial Walkthrough

- Conduct a thorough walkthrough of the property to observe its overall condition.
- Note any visible signs of damage, wear and tear, or immediate maintenance needs.
- Pay attention to key areas such as the roof, foundation, HVAC systems, plumbing, electrical systems, and common areas.

2. Documentation and Photography

- Document all observed maintenance concerns using written notes and photographs.
- Take clear and detailed photos of any existing damage or maintenance issues.
- Organize the documentation for easy reference and future assessments.

3. Maintenance History Review

- Request the maintenance history from the previous property owner or manager.
- Review past maintenance records to identify recurring issues or unresolved problems.
- Look for patterns of neglect, deferred maintenance, or ongoing repairs.

4. Professional Inspection

- Hire a qualified inspector or maintenance expert to conduct a detailed assessment.
- Request a comprehensive inspection report that covers all major systems and structural components.
- Address any immediate safety hazards or critical maintenance needs identified during the inspection.

5. Long-Term Problem Identification

- Evaluate the potential for long-term problems or underlying issues.
- Consider factors such as the property's age, construction quality, and previous maintenance practices.
- Identify areas that may require proactive maintenance, renovation, or system upgrades in the future.

6. Prioritization and Action Plan

- Prioritize the identified maintenance concerns based on their severity and potential impact on tenants, property value, and long-term operations.
- Develop an action plan to address the maintenance issues systematically.
- Set realistic timelines and allocate appropriate resources for each maintenance task.

Template: New Property Intake – Assessing Maintenance Concerns

7. Budgeting and Resource Allocation

- Estimate the costs associated with resolving the identified maintenance concerns.
- Allocate a portion of the property's budget specifically for ongoing maintenance and future repairs.
- Consider long-term budgeting strategies to ensure sufficient funds are available for preventative maintenance and major repairs.

8. Regular Maintenance Schedule

- Create a schedule for regular maintenance tasks such as inspections, HVAC servicing, gutter cleaning, and pest control.
- Implement preventive maintenance measures to minimize the risk of future issues and extend the lifespan of the property's systems and components.
- Document the maintenance schedule and ensure it is followed consistently.

Template: Minimum Standard of Livability & Repair

Remember, this is a general template, and you can customize it based on the specific requirements and standards of your properties.

Adequate Structural Integrity	Yes	No
No visible signs of structural damage or cracks.		
Roof is in good condition, free from leaks.		
Foundation is solid, without noticeable shifting or settling.		
Exterior walls are intact and properly sealed.		
Comments:		
Proper Electrical Functionality	Yes	No
Electrical system is in good working condition and up to code.		
Outlets and switches function properly and are not a safety hazard.		
GFCI outlets tested and functioning properly.		

Template: Minimum Standard of Livability & Repair

Wiring is not exposed or damaged.		
Indoor and outdoor lighting is sufficient to ensure safety and visibility.		
All light fixtures are operational and free from hazards.		
Comments:		
Functional Plumbing	Yes	No
No leaks or water damage around pipes, faucets, or fixtures.		
Toilets, sinks, and showers/tubs have proper water flow and drainage.		
Plumbing fixtures are in good working condition.		
Water shutoff valves are installed, accessible and working.		
Drains and sewage systems are clear and functioning properly.		
Comments:		

Template: Minimum Standard of Livability & Repair

Heating and Cooling	Yes	No
Heating system is functional and provides adequate warmth.		
Cooling system (if applicable) is functional and provides adequate cooling.		
Thermostat operates properly and allows for temperature adjustments.		
Ventilation is sufficient to maintain fresh air circulation.		
HVAC filters are accessible.		
Comments:		
Safe and Functional Windows and Doors	Yes	No
Windows and doors open and close properly.		
Functioning and appropriate locks on windows and doors.		
No broken or cracked glass in windows or doors.		

Template: Minimum Standard of Livability & Repair

Comments:		
Appliances	Yes	No
All appliances (oven, refrigerator, dishwasher, etc.) are in working order.		
All appliances have intact manufacturer/model information.		
Appliances are able to run without tripping the circuit breaker.		
Comments:		

Clean Up Your Bad Properties

Welcome to the chapter on tackling and improving your worst offending properties. By leveraging the 80/20 rule, we can focus our efforts on the properties that have the most impact with the least effort. In this chapter, we will guide you through a strategy to identify and address the issues in your bad properties, allowing you to enhance their livability and overall value.

Discovering the Unique Challenges

To paraphrase Tolstoy, "Good properties are all alike. Every bad property is bad in its own way." In this part of the strategy, our mission is to uncover how each bad property is specifically problematic. By understanding the unique challenges of each property, we can develop targeted solutions to improve them.

Establishing a Minimum Standard

If you haven't done so already, it's crucial to create a minimum standard of livability and repair. This standard represents the bare minimum requirements for renting out a property while still feeling good about it. While not as stringent as your turnover checklist, it should cover basic aspects that ensure the safety and functionality of the property.

For example, include items such as "all electrical outlets secured to the wall," "continuous heating without circuit tripping," or "sink held together without the use of duct tape" (yes, we've encountered this too). These standards will serve as a baseline for your inspections and subsequent work orders.



Clean Up Your Bad Properties

Implementing Regular Inspections

To proactively address the issues in your bad properties, initiate a campaign of regular annual inspections. Prioritize your "Bad" properties first, followed by the "Okay" ones. Regular inspections will help you stay ahead of maintenance problems, identify potential hazards, and prevent further deterioration of the property.



Taking Immediate Action

During your inspections, be diligent in noting any findings that fall outside your established minimum standards. Create work orders immediately for these items to initiate the necessary repairs or improvements. By promptly addressing these issues, you can start the process of turning your bad properties into more desirable and profitable assets.

By focusing on your worst offending properties and implementing regular inspections along with immediate action, you can make significant progress in cleaning up or even transforming them. Remember, the key is to identify their unique challenges, establish a minimum livability standard, conduct inspections, and address issues promptly. With this approach, you'll be on your way to wiping out the problems and elevating the value of your properties.

Difficult Conversations: Correct or Offboard Problematic Owners



As a property manager, you're well aware that dealing with properties is just part of the job. The other essential aspect involves dealing with the property owners themselves. While some owners are a pleasure to work with, others can be quite the opposite. Some owners are proactive and invested in maintaining their properties. Others exhibit behaviors that contribute to problematic conditions. In this chapter, we will delve into the challenging task of addressing these issues head-on and navigating difficult conversations with owners.

Identifying Problematic Owners

Before diving into specific solutions, we need first to identify the problematic behaviors that contribute to "bad" properties. Sometimes a property's negative traits are driven by the owner's unwillingness or inability to put in the necessary funding or oversight for improvements. Here's a list of suggestions to get you started:

- ▶ Imposing unrealistic budget limits, either \$0 or below reasonable market rates.
- ▶ Taking an excessively long time to approve necessary repairs due to a lack of responsiveness.
- ▶ Lacking the funds for necessary repairs.
- ▶ Insisting on using a specific vendor or conducting substandard work themselves.

Creating an Owner Behavior Analysis

Once you have identified the problematic behaviors, assign these behaviors to the owners of your "bad" properties. Utilizing a system with built-in analytics like Latchel can make it much easier to spot which owners demonstrate the most problematic behaviors. You may notice that a few owners stand out as being particularly troublesome, which likely correlates with the properties that cause you and your team the most headaches.

Difficult Conversations: Correct or Offboard Problematic Owners

Addressing the Issue

For these problematic owners, you need to make decisions on how you'll handle them. You have several options:

- ▶ Structured conversations: Approach the owner with specific examples of their problematic behavior and discuss possible solutions. Be friendly, conversational, and factual during these discussions.
- ▶ Offboarding them: If conversations do not lead to a change in behavior or you already know an owner will never change, you may need to consider ending your working relationship with these problematic owners.
- ▶ A combination of both: In some cases, it might be best to attempt structured conversations first, then offboard if there's no improvement.

Preventing Problematic Owners in the Future

As your business grows, it's crucial to accept fewer "bad" owners to maintain healthy growth. To do this, take your list of negative behaviors and update your Property Management Agreement to spell out minimum relationship expectations. For example:

1. Specify budget limits must be at least \$X.
2. State that legally necessary repairs must be approved and funded within X days, with outlined consequences if this is not adhered to.

Ensure all new clients sign the updated agreement. Also, target current clients to sign the updated agreement when their current agreements expire.

Handling problematic owners is an inevitable part of property management but taking the necessary steps to identify, address, and possibly offboard them can greatly benefit your business. By setting clear expectations and maintaining open communication, you can create a more positive experience for both you and your clients. Remember, the key to success in property management is not just about managing properties, but also building and maintaining strong relationships with clients. Keep the lines of communication open and approach challenges with a blend of wit, tact, and dedication to achieve the best possible outcomes. Property management may often feel like a circus, but that doesn't mean you have to put up with all the antics of the clowns!

Sample Script: Having a Difficult Conversation with a Problematic Owner

You: Hi [Owner's Name], I hope you're doing well. I wanted to have a chat with you about our work order and approval process to ensure that we can manage your property effectively and maintain a high standard for our residents. Is this a good time for you to discuss?

The property manager starts the conversation with a positive and respectful tone, focusing on the common goal of managing the property effectively.

Owner: Sure, I have a few minutes.

You: Great, thank you for taking the time. I respect how involved and cautious you are with authorizing work orders, and I understand that you're trying to make sure your property investment is well-managed. However, having to request your approval on every single work order, including emergencies, can sometimes impede quick resolutions and adversely affect our residents' experience.

The property manager acknowledges the owner's concerns and tries to create shared meaning by focusing on the owner's intentions instead of the impact of their actions. This way, the conversation remains non-confrontational and supportive.

Owner: Well, I'm concerned about the expenses and want to make sure that I'm notified of any potential repair issues.

You: I completely understand that, and I think it's crucial that we work together to find a balance between your engagement and efficient processes. For non-emergency work orders, I suggest that we establish a communication method that ensures you are informed and in control. For example, we can send you a summary report every week highlighting the non-emergency work orders and their respective costs. This way, you'll always be in the loop.

The property manager shows empathy toward the owner's situation, assuring them that their concerns have been heard. They offer a solution focused on collaboration, demonstrating flexibility and a willingness to adapt to the owner's needs.

Sample Script: Having a Difficult Conversation with a Problematic Owner

You: As for emergency work orders, quick action is vital to avoid further damage and ensure the well-being of our residents. Perhaps we could establish a threshold for emergency work order costs, say \$X, where anything below this amount doesn't require your immediate approval. This would enable us to act quickly while still keeping you informed.

The property manager reframes the problem by highlighting the consequences of seeking approval for emergency work orders and suggests a mutually beneficial solution.

Owner: I see where you're coming from, but I still want to know what's going on with my property.

You: Your concerns are valid, and I want to make sure you feel in control while still allowing us to manage your property effectively. For emergencies, we can ensure that you receive an immediate notification with details of the issue and the cost of the repairs as they are happening. This way, you're always aware of what's going on without delaying the essential repairs. Additionally, we can schedule periodic meetings to discuss property maintenance trends and proactively plan for such situations in the future.

The property manager validates the owner's concerns while reemphasizing the importance of a balanced approach to communication and property management. They offer a compromise to keep the owner informed without compromising the urgent repairs needed.

Owner: That sounds like a good idea. Let's try this new approach.

You: I'm glad we were able to reach an agreement. I believe this new process will benefit both you and our residents, and it will allow us to manage your property more efficiently. Thank you for your understanding and for the productive conversation. We'll be in touch soon with the details of the new communication methods and to schedule our first meeting.

The property manager concludes the conversation by reinforcing the agreement, expressing appreciation, and sharing gratitude for the owner's willingness to work together.

Sample Script: Having a Difficult Conversation with a Problematic Owner

Owner: Sounds good. Thank you for addressing my concerns.

You: You're welcome, [Owner's Name]. I appreciate your openness and willingness to work together. Please don't hesitate to reach out if you have any questions or concerns in the meantime. Have a great day!

Throughout the conversation, the property manager creates a supportive environment, shows empathy, engages in active listening, and offers solutions based on collaboration and compromise. These efforts help the conversation to remain productive and foster a positive outcome.



Template: Owner/Manager Relationship Expectations

The following is a sample template of promises you may make to a property owner and your clear expectations of them.

My promises to you:

1. Always stick to your preferred budget limit rules, ensuring that we respect your financial constraints.
2. Provide a monthly report of all expenses by the 15th of every month, keeping you informed and updated on your property's finances.
3. Prioritize transparent and open communication, addressing any concerns or questions you may have in a timely manner.
4. Deliver professional and efficient property management services that adhere to industry standards.
5. Maintain a vendor network that is reputable, reliable, and offers competitive pricing for property-related services.
6. Proactively identify and address potential maintenance and repair issues, to prevent costly future problems.
7. Collaborate with you to create a customized property management plan, tailored to your specific needs and goals.

My expectations of you:

1. Provide a reasonable budget for work orders based on market rates, ensuring that the property remains well-maintained and competitive in the rental market.
2. Approve legally necessary work within 24 hours and approve or deny other work within 5 business days, allowing for swift and efficient resolutions to property-related issues.
3. Ensure legally necessary work is fully funded within 1 business day of approving or receiving a notification of a request and all other work within 3 business days of approving or receiving a notification of the request.
4. Utilize my vendor network if your existing preferred vendors do not respond or cooperate with my team's processes, ensuring quality and consistency in services rendered.
5. Maintain open and respectful communication, fostering a collaborative partnership for the betterment of your property.
6. Abide by the terms of our Property Management Agreement, creating a stable and reliable working relationship.
7. Notify us promptly of any changes in your preferences, expectations, or financial situation, so that we can adapt our strategies accordingly.

Proper Preventative Maintenance: Avoiding the "Okay" Property Trap



Congratulations! At this point, you've successfully managed to tackle your "bad" properties by bucketing them, improving your property turnover process, implementing annual inspections, and reviewing your problematic owners. It's safe to say you've graduated from the "bad property management school" – with honors! But now it's time to face a new challenge: transforming your "Okay" properties into "Great" ones... or at least "Good" ones!

Avoiding the "Okay" Property Trap

Let's start by setting a realistic goal here. While we all want every property to be picture-perfect, the objective is to reduce the overall maintenance burden and cost on your properties, not to turn Class B properties into Class A ones. As a property manager, you must know your limits – Rome wasn't built in a day, after all.

While "Okay" properties may seem acceptable because they feel "about average compared to your peers," simply settling for them may not be the best long-term strategy for property managers.

Here are some reasons why striving for more than just "Okay" properties is a good idea:

1. Untapped growth potential: By transforming "Okay" properties into better-performing ones, you can unlock rent increase opportunities and property appreciation potential, allowing for greater returns on your investments.
2. Tenant satisfaction and retention: Tenants who find themselves in above-average living spaces are more likely to remain satisfied and stay longer, reducing tenant turnover risk and maintaining a steady rental income stream.
3. Enhanced reputation: Moving from "Okay" properties to having a portfolio known for exceptional quality and care helps build a positive image among prospective tenants and owners, attracting new clients and retaining existing ones.
4. Streamlined long-term maintenance costs: A proactive effort in property improvements and prioritizing preventative maintenance can lead to reduced long-term maintenance costs, by avoiding more severe and costly problems that can arise from average property conditions.
5. Competitive advantage: In a highly competitive rental market, upgrading "Okay" properties can give you an edge over other property managers who are content with maintaining average properties. This can help in attracting and retaining quality tenants or clients who are willing to pay higher rents for superior living conditions.

Proper Preventative Maintenance: Avoiding the "Okay" Property Trap

By aiming to elevate your property portfolio from "Okay" to "Good" quality, you invest not only in the properties themselves, but also in the overall reputation and success of your property management business. Striving for better standards leads to more satisfied tenants and owners, ultimately resulting in a thriving and prosperous property portfolio. Again, this isn't about creating Class A properties – it's about creating reliable properties that don't have never-ending maintenance headaches for you nor for the renters.

Aim for "Reliable", Not "Luxury"

The ultimate goal for property managers should be to create "reliable" properties. Don't confuse "reliable" properties with "luxury" properties. Reliable properties are those that consistently meet the needs and expectations of tenants, ensuring that everything is functional and well-maintained, even if they don't possess high-end features or finishes. For example, while a Class A property might boast the latest smart appliances and designer cabinetry, a Class B or C property can still be regarded as reliable if it provides functional appliances and sturdy, albeit outdated, cabinetry. The key lies in ensuring that the essential features of the property, such as plumbing, heating, and electricity, work as they should – you don't need crown molding or designer light switch covers, but you do want the light to turn on when you flip the switch. By prioritizing reliability over luxury, property managers can build a solid foundation for tenant satisfaction, long-term retention, and consistent rental income, ultimately contributing to a successful and sustainable property portfolio.

Preventative Maintenance: Your Secret Weapon

Now, it's time to discuss the holy grail of property management: preventative maintenance. Think of it as the miraculous elixir that keeps your properties in tip-top shape, enabling problem-free operations. To accomplish this, you'll need to augment your existing annual inspections with a preventative maintenance campaign.



Proper Preventative Maintenance: Avoiding the "Okay" Property Trap

Where to Get Started with Preventative Maintenance

By this point, you should have already tackled and improved your properties that generated the most requests. You now want to be looking at the most common types of work excluding your worst properties. You want to understand what more “typical” maintenance looks like. A system like Latchel makes it easy to identify your most common maintenance requests by problem or specific trade or skill required to solve. It’s this information that tells you where to get started. Take your most common request type, whether it’s HVAC issues or plumbing, and use that to determine what your first preventive maintenance program will cover.



Build Your First Preventative Maintenance Program: Step-by-Step Guide

1. Identify your most common maintenance requests by problems or skill/trade required. Be sure to exclude your worst properties from this analysis as they will skew the results.
2. Review either all or a large sample of issues across a diverse range of properties. Manually identify potential root causes and keep an eye out for things that could have been prevented through proper maintenance.
3. Select your top 3-5 preventative maintenance activities that would have reduced those issues. Use this as the foundation for your new preventive maintenance program.
4. Pull up your list of the most expensive maintenance requests of the year that matched this category.
5. Review every request and see if there are any additional preventive maintenance measures that could have prevented those problems.
6. If you find any new opportunities, run a simple cost/benefit analysis to determine if it is worth including these measures annually or less frequently.
7. Repeat for your next most common issues until you've covered 60-80% of your typical maintenance issues.



Two Sides of the Same Coin: Seasonal vs. Preventative Maintenance

It's essential to understand and take advantage of the difference between seasonal maintenance and preventative maintenance. While seasonal maintenance aims to prevent problems tied to specific times of the year (e.g., fall leaf cleanup or gutter maintenance), preventative maintenance ensures the long life and smooth operation of your property's systems (e.g., HVAC tune-ups or roof inspections). The two work together like peanut butter and jelly – separately, they're good; but together, they make your property management life deliciously smooth.

Build Your First Preventative Maintenance Program: Step-by-Step Guide

Preventative maintenance isn't an annual one-and-done deal. Depending on your region and property type, it may require more frequent attention. For instance, you may need to perform winterization tasks, or heating/cooling system maintenance multiple times a year, while other tasks, like sump pump maintenance, may only require attention once every few years.

By implementing smart and targeted preventative maintenance strategies, you can graduate your "Okay" properties to the next level, ensuring a well-maintained and lower-cost portfolio. Establishing a robust preventative maintenance program is like planting the seeds for a prosperous property management garden. Nurture it with a well-thought-out plan, and you'll watch your property portfolio flourish, standing the test of time – and the elements!

Sample Collection of Preventative Maintenance Measures

By no means should your preventive maintenance program include all of these measures. Focus on the most common problems your properties face. The following is a list of suggestions in case you're feeling stuck or need inspiration for how to prevent a certain type of problem.



Plumbing

- To prevent leaks, inspect seals and connections in all pipes, faucets and fixtures. Ensure water shutoff valves are accessible and functioning properly.
- To prevent water heater failure, visually inspect the water heater for leaks, corrosion, or other signs of wear.
- To prevent discolored water and sediment buildup, flush water heaters annually.
- To prevent frozen pipes and potential pipe bursts, insulate exposed pipes.
- To prevent slow drip leaks, inspect and replace worn out washers and seals in faucets and shower heads.
- To prevent clogged drains, ensure drain strainers are present and available to use.
- To prevent water waste from toilets, check the function and condition of the flapper, fill valve, and float inside the toilet tank.
- To prevent scale buildup on plumbing fixtures, consider installing a water softener, especially in areas with hard water.
- To prevent damage to the property's plumbing system, educate tenants on best practices and preventative measures, such as avoiding flushing inappropriate items and proper disposal of grease.

Build Your First Preventative Maintenance Program: Step-by-Step Guide

Appliances

- To prevent reduced appliance performance, clean and service appliance vents (e.g., dryer vents).
- To prevent refrigerator inefficiency and failure, inspect refrigerator coils and clean them.
- To prevent oven temperature discrepancies, check and replace worn oven and stove top seals.
- To prevent dishwasher clogs and reduced cleaning performance, clean dishwasher filters.
- To prevent water leaks and damage under appliances, inspect water supply lines for washing machines and refrigerators.
- To prevent appliance wear or failure, ensure they are properly leveled and stable.
- To prevent damage to the property's appliances, educate tenants on best practices and preventative measures, such as proper loading and use of correct detergents in washing machines and dishwashers, emptying the lint trap after every dryer load, how to clean the dishwasher filter, how to properly use a garbage disposal, and other issues that create common problems. Do not assume these are common sense!



Doors, Locks, and Windows

- To prevent loose or difficult-to-open doors, inspect and lubricate locks, hinges, and window mechanisms regularly.
- To prevent drafts and energy inefficiency, check and replace worn or damaged weatherstripping around doors and windows.
- To ensure proper security, verify the function and condition of all door and window locks.
- To prevent water and air infiltration, inspect and repair caulking around windows and door frames as needed.
- To maintain the appearance and extend the life of exterior doors, clean and apply a protective finish periodically.
- To ensure the longevity of sliding doors and windows, clean and lubricate the tracks regularly.
- To maintain smooth operation of garage doors, inspect and lubricate the springs, rollers, and tracks annually.
- To prevent pest intrusion, repair or replace damaged window screens and door sweeps as needed.
- To prevent accidental glass breakage, ensure safety glass is installed in high-traffic or high-risk areas, such as sliding glass doors or large windows.
- To prevent damage to door and window mechanisms, educate tenants on proper usage and care, including avoiding excessive force and ensuring proper alignment during operation.

Build Your First Preventative Maintenance Program: Step-by-Step Guide

Sprinklers and Irrigation

- To prevent wasted water and high water bills, check for leaks or damages in the irrigation system and repair them promptly.
- To prevent damage to sprinkler systems due to freezing temperatures, perform a seasonal winterization of the system by shutting off the water supply and draining water from the system.
- To avoid damage to sprinkler heads and pipes, educate tenants on the location of sprinkler heads, proper landscape care and avoid using heavy equipment or driving over sprinklers.

Sump Pumps

- To prevent sump pump failure and potential flooding, test the sump pump by pouring water into the pit until the pump activates, and ensure it is pumping water out properly.
- To maintain sump pump efficiency and longevity, clean the pump and pit of debris to avoid clogs and ensure smooth operation.



Cabinetry and Other Cosmetic Interior Home Fixtures

- To maintain functionality and appearance, inspect and tighten loose cabinetry hardware on doors and drawers.
- To prevent warping and ensure the longevity of wooden cabinets, clean and polish them to maintain their finish.
- To prevent scratches or dents on walls due to furniture and decor items, educate tenants on proper installation and maintenance of hanging fixtures.
- To avoid water damage and discoloration on bathroom surfaces, maintain proper ventilation and encourage the use of shower curtains or doors to contain water.
- To prevent damage to fixtures such as towel bars and toilet paper holders, check their mounting hardware and tighten or repair as needed.
- To avoid loose or wobbly ceiling fans, inspect and tighten any loose screws or connections every six months, and balance the fan blades if necessary.
- To maintain the appearance of tile and grout, clean them regularly, and seal the grout to prevent staining and wear.

Build Your First Preventative Maintenance Program: Step-by-Step Guide



Electrical

- To ensure the safety and operation of Ground Fault Circuit Interrupter (GFCI) outlets, test and reset them.
- To ensure proper function and safety of smoke and carbon monoxide detectors, test and replace batteries, or use hardwired detectors with battery backups.
- To prevent circuit overloads and electrical hazards, educate tenants on safe electricity usage, such as avoiding the use of too many extension cords or overloading outlets.

Exterior, Structural, and Roofing

- To prevent water damage and potential structural issues, inspect roofs for damage, loose shingles, or leaks annually or after major storms.
- To prevent moisture buildup, mold, or rot, ensure proper attic ventilation and insulation.
- To avoid water damage, clean and maintain gutters seasonally, ensuring they are clear of debris and securely fastened.
- To prevent foundational issues, inspect foundations for cracks, moisture, or pest infiltration, and address any problems promptly.
- To preserve siding and avoid damage, inspect and repair loose or damaged siding panels, and clean them to remove dirt, algae, or mold.
- To maintain the life of exterior paint or stain, perform regular inspections for peeling or chipping, and repaint or restain as needed.
- To prevent water damage and structural issues, ensure that exterior grading directs water away from the building foundation.
- To avoid potential pest issues or structural damage, inspect and maintain exterior wood features, like decks and fences, ensuring they are sealed and in good repair.
- To prevent damage to walkways, driveways, and patios from water intrusion and ice, inspect surfaces for cracks, clean any debris, and repair or reseal as needed.
- To ensure the safety and integrity of exterior stairs and railings, inspect them for damage or wear, repairing or replacing any unstable or worn components.
- To avoid damage to chimneys or venting systems, inspect, clean, and maintain chimney caps, vent covers, and flashing, addressing any signs of wear or damage.

Build Your First Preventative Maintenance Program: Step-by-Step Guide

- To prolong the life of windows and doors, inspect and maintain caulking and weatherstripping, replacing any damaged or missing material to prevent drafts and moisture intrusion.
- To minimize wind damage during storms, trim and maintain trees around the property, ensuring limbs and branches are clear of roofs, siding, power lines, and other structures.
- To minimize structural issues, educate tenants on the most common issues, how to spot them, and how to report them so you can quickly resolve them before they become bigger issues.



Master Your Preventative Maintenance Plan: Art & Science

A successful property management operation comprises several vital components, and embracing preventative maintenance can be the cherry on top. It takes something that is already good and refines it into something truly great. Mastering your preventative maintenance plan requires the fusion of disciplined organization and a genuine passion for property management. Now that you have built a solid foundation in maintaining properties, it's time to fine-tune your approach to preventative maintenance and take your operation to new heights.



Adopting a Holistic Approach: Combining Preventative Maintenance with Inspections

One way to take a holistic approach and maximize efficiency in your property management operation is by integrating your preventative maintenance efforts with inspection activities. Instead of maintaining separate programs for these two components, consider streamlining your process for a more proactive and cost-effective strategy.

For instance, you can perform a light exterior inspection during seasonal winterization activities, and a brief interior inspection before summer begins. This method allows you to cover essential maintenance tasks while assessing key areas that may need attention. The resident can also feel taken care of, as they witness your commitment to ensuring their safety and comfort by changing HVAC filters during the inspection, for example.

Moreover, using this approach can help you conserve resources on in-depth inspections, as you can now focus them on properties that show indications of potential issues during these lighter inspections. If any problems are spotted during these quick visits, you can schedule a follow-up in-depth inspection to address them promptly.

Communication is crucial during this process. Emphasize to the residents your company's dedication to their well-being and your commitment to excellent service. As a result, they will likely appreciate your follow-up visits rather than seeing them as an unwelcome intrusion into their home.

Master Your Preventative Maintenance Plan: Art & Science

Crunching the Numbers: Tracking Your Performance Metrics

As you streamline your plan, tracking the right metrics becomes vital in measuring success. Metrics can be divided into outcomes, which reflect end results, and activities, the steps taken to achieve the outcomes. Carefully chosen metrics can shed light on which aspects need your focus and where you need to concentrate your efforts for improvement. You have control over your activities, but you can only influence your outcomes. While it's true that you can only manage what you can measure, just because you can measure something doesn't mean you can manage it. In other words, be sure to manage your activities you have control over in order to influence the outcomes you want to achieve.

For example, outcome measures could include:

- Money saved through preventative measures
- Total number of reduced maintenance requests
- Decrease in emergency repair expenses

On the other hand, activity measures might consist of:

- Number of inspections performed per quarter
- Percentage of properties with completed annual maintenance
- Average response time to reported maintenance issues



Continuous Improvement: Evolving and Perfecting Your Maintenance Plan

Remember that even the best-established routines can always benefit from a bit of reflection and improvement. Make it a point to set aside time quarterly or bi-annually to review your preventative maintenance process and identify areas for growth or optimization. This may involve tweaking your processes, adopting new technologies, or eliminating bad practices.

Think of this step as performing preventative maintenance on your preventative maintenance process (maintenance-ception, anyone?). Ensuring your plan is continuously evolving and adapting will contribute to its long-term sustainability and help your property management business thrive.

Master Your Preventative Maintenance Plan: Art & Science

Crafting an effective and cost-effective preventative maintenance plan is a harmonious blend of planning, organization, and creativity. It's both an art and a science. As you refine your processes and keep a keen eye on your metrics, your property management operation will continue to thrive and achieve greater overall success. By combining your effort and passion for property management your preventative maintenance plan will serve as the icing on the cake – taking your already good properties and turning them into something truly great.

Want More Maintenance Tips?

Looking for more ways to improve your maintenance processes and streamline your operations? [Click here](#) to watch our on-demand webinar: The Amazon Approach to Scaling Maintenance Operations.

In this webinar, you'll learn how to apply Amazon principles to improve your maintenance operations, overcome common challenges, and deliver exceptional service to your residents. Whether you have a small or large portfolio, this webinar is designed to help you convert chaos to order, optimize efficiency, and scale your business. Don't miss out on valuable insights and actionable best practices using real-life examples that will transform your maintenance operations. Tune in now to take your business to the next level!



Summary

Want to Take Your Business to the Next Level?

Latchel takes all maintenance calls and requests and automates the tedious aspects of the end-to-end coordination process based on your customized workflows.

You get to redirect your time to strategically growing the business. Latchel is the only platform that combines revenue-generating resident amenities with maintenance software that empowers property managers to deliver unbeatable customer service.

If you want to learn more about how Latchel can help you scale your maintenance operations while improving your resident experience and earning additional income, [click here to request a demo](#).

About Latchel

Latchel is a software platform that enables property managers to be more responsive and offer better perks while also creating a new revenue stream so you don't have to choose between happy tenants and a healthy bottom line.

If you're ready to build an anti-fragile business and thrive through the unexpected, [request a live demo today](#).

Request Demo