

Tips for a Seamless Transition

We all know how disruptive it can be to client services when there is a change in managers. Whether a manager resigns, is transferred or worse yet, terminated, there will be a period of transition for the affected clients. As professionals, we must do our best to make sure that the transition is as seamless as possible to our valued clients.

How do the community and management company work together to ensure a new managers get a good start.

1. **Property Knowledge:** What is the type of ownership of the community (i.e., condo vs. townhome), how many homes are in the community and what are its physical qualities? Make sure the manager-to-be understands the community.
2. **Financial Information:** What is the current fee level and how often is it assessed? What is the association's fiscal year? When was the last time the reserve study was updated and how does the association stand financially? Make sure everyone is on the same page, so the new manager can start with a smaller learning curve.
3. **Maintenance Responsibility Chart:** It is very important that the new manager gain a working knowledge of the maintenance responsibilities of that association. It can be difficult to explain why a work order was issued for a roof leak when the association does not maintain roofs.
4. **Meet with Major Service Providers:** Do take the time to have the manager meet with the association's contractors. Remember, it is the work of these contractors that help make the community look good (or even bad) so encourage that manager to build a trustworthy, respectful working relationship with the contractors.
5. **Learn the Resolutions/Rules for Property:** Much like the maintenance responsibility chart, it is vital that the manager familiarizes him or herself with the association's rules and regulations.
6. **Meeting Protocol:** The new manager should be given some insight into how the meetings are run. Does the board president run the meeting or does he or she prefer that management leads the agenda? Are the minutes taken by the secretary or is there a recording secretary paid? Is a timed agenda used or are does the board prefer to not use an agenda? No information is too much to prepare the manager for that first meeting.
7. **Conduct Complete Property Inspection:** Prior to the new manager's first board meeting, a comprehensive inspection of the property should be conducted.
8. **Insurance Requirements:** What type of insurance policies does the association maintain? What is the insurance responsibility of the homeowner? Is the insurance schedule updated? Insurance is not something that can slip through the cracks.
9. **Update and Maintain the Emergency Contact List:** The emergency contact lists need to be updated immediately upon the departure of the prior manager. As its name indicates, the information on the list needs to be reliable in the case of a true emergency.

While this list is by no means all-inclusive, knowledge of these tips will place the manager on the right path for a successful manager transition.