COMMUNICATION GUIDELINES

pmXcite

Property Manager Communication Guidelines

At (agency name), we are committed to providing a 5 star experience for our clients. How we communicate is an integral part of how clients feel about their dealings with us.

Outlined below are guidelines around how we communicate and where this communication is stored. Please ensure you are adhering to these at all times.

PHONE CALLS

- Our office has a phone first policy when communicating with our clients at critical points in our relationship. These will be outlined in our checklists. Phone calls form a critical part of our 5 star experience.

- If a client is not available when you call, be sure to leave your name and number for them to return your call.

  Be mindful of not leaving lengthy voicemail messages as many clients do not listen to them. A separate voice message or SMS may be more appropriate.

  If your call is unanswered, create a Note & Alert with the details and a followup date in case the client does not return your call.

- Inappropriate language is not permitted when speaking with a client e.g. swearing or yelling

- Be mindful of not disrupting your colleagues when speaking on the phone i.e. be conscious of how loud you are, don't use phone on speaker mode

PHONE MESSAGES

- All phone messages from reception to PMs are provided through PT in Notes & Alerts (no emails unless a personal matter).

  Note must include the name of the person calling, mobile telephone numbers and the reason for the call with Alert Date to be the date message received.

  Category to be selected is PHONE MESSAGE

- Messages from Reception and missed calls/voice messages on mobile phones must be responded to/call returned within 4 hours

INCOMING EMAILS

- Incoming emails are to be responded to on the same day they are received. At the very least, an acknowledgement of receipt should be given with a timeframe around when a response will be provided.

- All incoming emails relating to a property, are to be stored in PT.

  If the email has been received outside of PT, then it is to be "dragged & dropped under the Documents tab against the relevant contact i.e. the relevant owner or tenant.

  The Document Details are to be added with the appropriate Document Name, Type and Notes completed.

  It is important that all three fields are completed and the document name allows it to be clearly identified e.g. (Document Name) Email - Pet Approval, (Type) Owner - Correspondence, (Notes) Confirmation owner is happy for the tenant to get another cat.

OUTGOING EMAILS

- All emails relating to an owner or tenant are to be sent from PT.
- Telephone conversations with owners and tenants are to be confirmed via an email generated in PT in most instances e.g. lease renewal instructions, changing of inspection time.
- Depending upon the matter, there may be a mail merge template available which is appropriate to select. Always use one of these if available.
- Templates are available to be copied and pasted into an email in PT for different situations, including confirmation of conversations. These templates can be used as starting points and are stored on the server in (folder name).
- The tone of any outgoing emails must be appropriate for the situation. It is important to take into consideration how the person receiving the email will feel when reading the message to avoid misunderstandings.
- Spelling mistakes are to be avoided and the correct grammar and punctuation to be used in written communication. If you are unsure, please ask a colleague to assist.
- Copying and pasting from an email received by another person or forwarding is not permitted e.g. tenant request is added to an email to owner. Wherever possible, the request is to be framed in our words to avoid misunderstanding and demonstrate our value to the client.

‘Excellence is not a skill, it’s an attitude’

INTERACTION NOTES

- A record is to be kept for every interaction relating to a property, including phone calls and face to face meetings.

  This includes any conversations with salespeople, neighbours, family members, etc as well as owners, tenants and tradespeople.

- If it is not appropriate to email confirmation of a conversation, interaction notes are to be added to Notes & Alerts against the relevant client name.

- An interaction note is to be added to Notes & Alerts against the relevant client name. If there is no client involved i.e. tenant or owner, then it is appropriate to add against the property address itself.

NOTES & ALERTS

- Are to be monitored by the Property Manager and actioned throughout the day

- No Alerts should be overdue as the appropriate action should have been taken on the due date. If the date in the alert is changed to a later time, then a note is to be added explaining why the date was changed e.g. Heavy storm today so Gardener has advised they will inspect the lawn on Monday.