**Residential Property Onboarding Checklist**

| Task | Description | Completed |
|------|-------------|-----------|
| **Tenant Screening** | Collect rental applications and verify all provided information. | ☐ |
| | Conduct credit checks to evaluate financial reliability. | ☐ |
| | Perform background checks for renting history and evictions. | ☐ |
| | Contact previous landlords for reference and confirmation of behavior. | ☐ |
| | Verify employment status and income to ensure the ability to pay rent. | ☐ |
| **Notes** | | |
| **Lease Agreement Preparation** | Customize lease agreements based on state and local regulations. | ☐ |
| | Clearly outline lease terms, including duration, rent amount, and payment deadlines. | ☐ |
| | Include clauses for security deposits, maintenance responsibilities, and tenant obligations. | ☐ |
| | Discuss and add any custom terms specific to the tenant and landlord's mutual agreement. | ☐ |
| | Review the final lease with the tenant for signature and confirmation of terms. | ☐ |
| **Notes** | | |
| **Move-In Inspection** | Walk through the property and document its condition with photos or videos. | ☐ |
| | Test all appliances, plumbing, and electrical systems for functionality. | ☐ |
| | Check the locks, doors, and windows to ensure security and proper operation. | ☐ |
| | List any pre-existing damages and share documentation with the tenant. | ☐ |
| | Obtain the tenant's signature on the inspection form for future reference. | ☐ |
| **Notes** | | |
| **Maintenance Schedule Setup** | Schedule seasonal HVAC maintenance to ensure efficient performance. | ☐ |
| | Set up landscaping or lawn care services if applicable. | ☐ |
| | Plan routine checks for plumbing systems, including water heaters and leaks. | ☐ |
| | Arrange for pest control services or inspections based on the area and building type. | ☐ |
| | Coordinate emergency repair procedures and vendor contacts. | ☐ |
| **Notes** | | |
| **Utility Setup** | Contact utility companies to establish new accounts for electricity, water, and gas. | ☐ |
| | Confirm if utilities will be in the tenant's name or included in tenancy agreements. | ☐ |
| | Set up service accounts for waste disposal and recycling. | ☐ |
| | Ensure internet and cable providers are contacted for setup if applicable. | ☐ |
| | Verify all meters are accurately recorded to avoid disputes during move-in. | ☐ |
| **Notes** | | |

**Commercial Property Onboarding Checklist**

| Task | Description | Completed |
|---|---|---|
| **Zoning Compliance** | Verify the property's zoning classification aligns with the intended business use. | ☐ |
| | Research local zoning laws and restrictions that may affect property operations. | ☐ |
| | Obtain required permits and approvals for any modifications or renovations. | ☐ |
| | Ensure compliance with regulations for parking, signage, and building accessibility. | ☐ |
| | Schedule inspections to confirm the property meets zoning and building codes. | ☐ |
| **Notes** | | |
| **Tenant Fit-Outs** | Assess tenant requirements for space layout and modifications. | ☐ |
| | Coordinate design planning with architects or interior designers as needed. | ☐ |
| | Oversee construction or renovation projects to ensure timelines and quality standards are met. | ☐ |
| | Arrange final inspections to confirm compliance with safety and building codes. | ☐ |
| | Provide tenants with guidance on utility setup and operational logistics within the space. | ☐ |
| **Notes** | | |
| **Commercial Lease Terms** | Draft leases that outline key terms, such as rent structure, lease duration, and renewal options. | ☐ |
| | Include provisions for property use, alterations, and maintenance responsibilities. | ☐ |
| | Address clauses for insurance liability, security deposits, and lease guarantees. | ☐ |
| | Review lease agreements with legal counsel to ensure compliance with state and local regulations. | ☐ |
| | Conduct lease negotiations with tenants to finalize terms and agreements. | ☐ |
| **Notes** | | |

**New Property Onboarding Checklist**

| Task | Description | Completed |
|---|---|---|
| **Inspections** | Conduct a thorough walkthrough to assess the condition of the property. | ☐ |
| | Inspect structural elements such as foundation, roof, and walls for any damages. | ☐ |
| | Check utility systems like plumbing, electrical, and HVAC for functionality. | ☐ |
| | Identify and document necessary repairs or maintenance needs. | ☐ |
| | Schedule professional inspections where needed for safety or legal requirements. | ☐ |
| **Notes** | | |
| **Legal Compliance** | Verify the property complies with all local and state statutes. | ☐ |
| | Ensure all property taxes are up to date. | ☐ |
| | Confirm any required permits or licenses are obtained for operation or renovations. | ☐ |
| | Review zoning regulations and restrictions applicable to the property. | ☐ |
| | Address any environmental compliance issues, such as waste disposal or hazardous materials. | ☐ |
| **Notes** | | |
| **Setting Up Property Management Systems** | Choose and implement a property management software system. | ☐ |
| | Create a record-keeping structure for tenant documentation and financial tracking. | ☐ |
| | Establish procedures for maintenance requests and vendor scheduling. | ☐ |
| | Set up automatic rent collection systems and processes. | ☐ |
| | Train staff or property managers on the tools and systems being implemented. | ☐ |
| **Notes** | | |

**Tenant Onboarding Checklist**

| Task | Description | Completed |
|------|-------------|-----------|
| **Welcoming New Tenants** | Prepare a welcome packet with property rules, contact information, and local amenities. | ☐ |
| | Conduct a welcome meeting or call to introduce tenants to the property manager. | ☐ |
| | Provide keys, access codes, or fobs as required for property entry. | ☐ |
| | Explain procedures for maintenance requests and emergency contacts. | ☐ |
| | Offer a guided tour of the property or common areas if applicable. | ☐ |
| **Notes** | | |
| **Ensuring Lease Agreements Are Signed** | Review the lease terms with tenants to clarify responsibilities and key conditions. | ☐ |
| | Provide all required paperwork including addendums for signature. | ☐ |
| | Confirm all parties have signed the lease and retain a copy for records. | ☐ |
| | Explain policies like late fees, rent payment methods, and notice periods. | ☐ |
| | Check that tenants have all necessary documentation, such as IDs and proof of income. | ☐ |
| **Notes** | | |
| **Collecting Security Deposits** | Clarify the purpose and terms of the security deposit per the lease agreement. | ☐ |
| | Provide tenants with an official receipt acknowledging the deposit. | ☐ |
| | Ensure the deposit is stored in a designated and legally compliant account. | ☐ |
| | Explain the process for deposit deductions or return at the end of the lease. | ☐ |
| | Document the deposit in the tenant's financial records for future reference. | ☐ |
| **Notes** | | |
| **Completing Move-In Inspections** | Schedule and perform a detailed walkthrough inspection with the tenant. | ☐ |
| | Document the property's condition with photos and an inspection checklist. | ☐ |
| | Address any immediate concerns or maintenance requests noted by the tenant. | ☐ |
| | Have the tenant sign the inspection form as acknowledgment of the current property state. | ☐ |
| | Provide a copy of the inspection report to the tenant for their records. | ☐ |
| **Notes** | | |

**Maintenance Onboarding Checklist**

| Task | Description | Completed |
|---|---|---|
| **Setting Up Maintenance Plans** | Assess the current condition of the property to identify maintenance needs. | ☐ |
| | Create a comprehensive list of preventive maintenance tasks required for the property. | ☐ |
| | Determine the frequency of maintenance tasks (e.g., monthly, quarterly, annually). | ☐ |
| | Develop a budget for recurring and emergency maintenance expenses. | ☐ |
| | Obtain approval for the maintenance plan from property owners or stakeholders. | ☐ |
| **Notes** | | |
| **Creating Schedules** | Set up a calendar with specific timelines for each preventive maintenance task. | ☐ |
| | Coordinate with tenants to schedule maintenance with minimal disruption. | ☐ |
| | Establish protocols for emergency maintenance and response times. | ☐ |
| | Document seasonal tasks, such as HVAC servicing or landscaping needs. | ☐ |
| | Allocate resources, such as staff or equipment, for scheduled maintenance. | ☐ |
| **Notes** | | |
| **Establishing Vendor Relationships** | Research and compile a list of reliable vendors for various maintenance tasks (e.g., plumbing, electrical repairs). | ☐ |
| | Negotiate contracts or service agreements with preferred vendors. | ☐ |
| | Verify vendor credentials, insurance, and certifications as applicable. | ☐ |
| | Build a contact database with vendor details and emergency availability. | ☐ |
| | Set up long-term partnerships or recurring service agreements where beneficial. | ☐ |
| **Notes** | | |

**Staff Onboarding Checklist**

| Task | Description | Completed |
|---|---|---|
| **Software Training** | Provide access credentials to necessary property management software. | ☐ |
| | Conduct a walkthrough of key software features and functionalities. | ☐ |
| | Train on generating reports, like financial summaries or maintenance requests. | ☐ |
| | Demonstrate how to input and update tenant or property information into the system. | ☐ |
| | Assign practice tasks to ensure team members are comfortable with the software. | ☐ |
| **Notes** | | |
| **Company Policies** | Distribute the employee handbook detailing property management procedures and guidelines. | ☐ |
| | Review workplace policies, including attendance and professionalism expectations. | ☐ |
| | Explain rules around tenant interactions, including privacy and complaint handling. | ☐ |
| | Discuss property-specific policies, such as maintenance procedures or lease enforcement. | ☐ |
| | Ensure acknowledgment forms are signed to confirm understanding of the policies. | ☐ |
| **Notes** | | |
| **Communication Protocols** | Explain the chain of command for reporting issues or concerns. | ☐ |
| | Train on email and phone communication best practices with tenants, vendors, and stakeholders. | ☐ |
| | Outline expectations for documenting conversations and property updates for record-keeping. | ☐ |
| | Introduce team collaboration tools and set guidelines on their proper use. | ☐ |
| | Role-play common scenarios to practice effective and professional communication. | ☐ |
| **Notes** | | |

**Short-Term Rental Onboarding Checklist**

| Task | Description | Completed |
|---|---|---|
| **Setting Up Cleaning Schedules** | Hire or contract professional cleaning services experienced with short-term rentals. | ☐ |
| | Create a cleaning checklist covering all areas, such as bedrooms, bathrooms, and common spaces. | ☐ |
| | Ensure cleaners have access to the property, including spare keys or codes. | ☐ |
| | Set up a pre and post-stay cleaning schedule based on booking dates. | ☐ |
| | Provide a supply restocking checklist for essential items like toiletries and kitchen basics. | ☐ |
| **Notes** | | |
| **Guest Communication** | Draft automated responses for common inquiries about the property and check-in process. | ☐ |
| | Set up a clear and welcoming check-in guide with property rules and local tips for guests. | ☐ |
| | Ensure a 24/7 contact is available to handle guest emergencies or last-minute questions. | ☐ |
| | Test and verify guest communication tools, such as SMS, email, or booking platform messaging. | ☐ |
| | Create a post-stay follow-up message template to prompt reviews or feedback. | ☐ |
| **Notes** | | |
| **Listing Optimization** | Review and update property photos to ensure high-quality and attractive visuals. | ☐ |
| | Write a compelling and accurate property description highlighting unique amenities or features. | ☐ |
| | Conduct research to set competitive nightly rates based on location and seasonal demand. | ☐ |
| | Add property safety and compliance details to reassure potential guests (e.g., smoke detectors). | ☐ |
| | Regularly monitor booking platform analytics to refine listing content and visibility. | ☐ |
| **Notes** | | |

**Portfolio Onboarding Checklist**

| Task | Description | Completed |
|---|---|---|
| **Streamlining Processes** | Conduct a detailed review of existing property management systems for all properties. | ☐ |
| | Consolidate accounting and financial reporting across properties into a unified system. | ☐ |
| | Standardize maintenance request procedures to ensure consistent handling for all properties. | ☐ |
| | Implement a single property management software platform for centralized operations. | ☐ |
| | Train staff members on updated, streamlined processes to ensure operational alignment. | ☐ |
| **Notes** | | |
| **Ensuring Consistency** | Audit lease agreements across the portfolio for standardized terms and conditions. | ☐ |
| | Develop a unified set of tenant communication templates (e.g., welcome packets, notices). | ☐ |
| | Create a portfolio-wide maintenance schedule for recurring tasks like inspections or servicing. | ☐ |
| | Establish uniform branding and signage policies across properties. | ☐ |
| | Set key performance indicators (KPIs) to consistently evaluate property performance. | ☐ |
| **Notes** | | |