

# Owner Onboarding Workflow Checklist

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## 1. Pre-Onboarding / Lead Qualification

- Qualify lead (property type, location, unit count, service needs, pricing expectations)
- Confirm service area and fit with company portfolio
- Schedule intake call or send pre-onboarding questionnaire

## 2. Initial Contact

- Send introductory text and email to owner – text first email follow up
- Confirm preferred communication method (text/email/phone)
- Begin intake conversation and gather basic property details

## 3. Intake & Information Gathering

- Answer owner questions and assess goals
- Request initial property info: address, units, occupancy, rent, concerns (usually 1-2 calls)
- Collect owner contact details (legal name, mailing address,
- If vacant:
  - rental analysis,
  - unit turnover,
  - evaluate property condition

## 4. Agreement Preparation

- Prepare agreement package (Management Agreement, Tenant Info Form, Pricing Sheet, Supplemental Forms)
- Schedule agreement review call if necessary
- Confirm effective management start date
- Confirm management fee structure
- Send for signature in appfolio

## 5. Document Collection

- Create and share SharePoint folder (Checklist, W-9, forms, ACH, Business Tax Id)
- Request completed documents, leases, tenant contacts, utility/service info
- Rental License confirmation or schedule lead testing and set up
- Gather HOA details (if applicable)

- Determine vendor/maintenance preferences (owner's vendors vs. company vendors)
- Confirm utility account responsibilities (water, sewer, trash, gas, electric)
- Request copy of insurance declaration page
- Upload documents to SharePoint

## **6. AppFolio Setup**

- Enter property and unit details into AppFolio
- Input tenant lease terms, rent charges, and contact info
- Verify rent schedule accuracy (amount, due date, late fees, grace periods)
- Add property photos and marketing description if needed
- Tag property with internal labels
- Add owner notes to AppFolio profile

## **7. Tenant Welcome Letter**

- Confirm tenant contact preferences before sending
- Send welcome letter to existing tenants
- Include tenant portal instructions and benefits package summary
- Add move-in or takeover date and new contact info

## **8. Internal Handoff**

- Notify John (Marketing) for turnover/photos/listings
- Notify Karen (Accounting) for disbursement setup and portal follow up support
- Add Maintenance team notification (for inspections, lead testing, or turnovers)
- Notify Mike if inspection is necessary

## **9. Final Setup / Confirmation**

- Invite tenants to portal after confirming charges and info
- Notify owner of completion/tenant placement and confirm any final steps
- Schedule 30-day owner check-in call or email
- Add to owner communication (monthly statement reminders, reporting)