

TIME MANAGEMENT

Planning & Prioritising
to Retain Your Sanity!

presented by **ShaunLuyt**
Your Partner in the "Business" of Residential Property Rentals



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Time Management

Some Basics

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Some Basic Principles

- Planning
- Batch Processing
- Focus
- Discipline

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Some Basic Time Management Practices

- Plan each day
 - use a Work/Task Schedule or Microsoft Outlook and stick to it
 - Set up for your day the afternoon before
- Do the difficult/boring/unpleasant things first
- Keep a time limit to phone calls
- If you are a victim of other people consuming your time take control

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Paperwork – the 5D Principle

- Decide
 - Do it
 - Delegate
 - Diarise
 - or Dump it

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Rolling Diary

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Focus & Planning

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Focus

- Monthly Plan
- Daily Task List

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Levels of Planning

- Monthly Planning
 - Incoming Inspections & Reports
 - Deposit Disbursement
 - Arrears Management
 - Renewals
 - Month-End Preparation
 - Outgoing Inspections
- Ongoing
 - Maintenance & Repairs
 - Rental Applications
- Weekly Portfolio Report

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Monthly Planning / Focus

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Monthly Operational Plan – Inspections & Deposits (RHA)

Mon	Tues	Wed	Thurs	Fri	Sat	Sun
1 Incoming Inspections	2 Inspection Reports	3	4	5 Deposits (70)	6	7 Deposits (70)
		Damage Repairs				
8	9	10	11	12 Deposits (140)	13	14 Deposits (140)
		Damage Repairs				
15	16	17	18	19 Deposits (210)	20	21 Deposits (210)
		Damage Repairs				
		Pre-Exit Inspections				
22	23	24	25	26	27	28
29	30	31 Outgoing Inspections				

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Monthly Operational Plan – Financial - Payments & Arrears Management

Mon	Tues	Wed	Thurs	Fri	Sat	Sun
1 Payments	2 Payments	3	4	5 Deposits (70)	6	7 Deposits (70)
		Damage Repairs				
		Arrears Management				
8	9	10	11	12 Deposits (140)	13	14 Deposits (140)
		Damage Repairs				
15	16	17	18	19 Deposits (210)	20	21 Deposits (210)
		Damage Repairs & Pre-Exit Inspections				
22	23	24	25	26	27	28
29	30 Payments	31 Outgoing Inspections				

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Mon	Tue	Wed	Thurs	Fri	Sat	Sun
1 Payments Incoming Inspections	2 Payments Incoming Reports	3 Arrears management	4 Deposits (10)	5 Lease Renewals	6 Deposits (20)	7 Deposits (20)
8 Lease Renewals	9 Damage Repairs	10 Lease Renewals	11 Deposits (140)	12 Deposits (210)	13 Deposits (140)	14 Deposits (210)
15 Damage Repairs & Pre-Let Inspections	16 Lease Renewals	17 Lease Renewals	18 Lease Renewals	19 Lease Renewals	20 Lease Renewals	21 Lease Renewals
22 Lease Renewals	23 Lease Renewals	24 Lease Renewals	25 Lease Renewals	26 Lease Renewals	27 Lease Renewals	28 Lease Renewals
29 Lease Renewals	30 Payments	31 Outgoing Inspections Payments				

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Mon	Tues	Wed	Thurs	Fri	Sat	Sun
1 Payments Incoming Inspections	2 Payments Inspection Reports	3 Arrears management	4 Damage Repairs	5 Deposits (70) Lease Renewals	6	7 Deposits 70
8	9	10	11 Damage Repairs Lease Renewals	12 Deposits (140)	13	14 Deposits 140
15	16	17	18 Damage Repairs & Pre-Eat Inspections	19 Deposits (210)	20	21 Deposits 210
22	23	24 Lease Renewals	25	26 Month-End Prep & Checks	27	28
29	30 Payments Month-End Prep & Checks	31 Outgoing Inspections Payments				

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Time Management

Weekly Portfolio Report

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Weekly Portfolio Report

- Management
 - Team Member / Team Accountability
- Team Members
 - Peace of Mind
 - Double check
- Basis for Weekly Rental Team / Portfolio Team Meeting
- Same day every week

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Weekly Portfolio Report - Maintenance

MAINTENANCE MANAGEMENT
 Refer Maintenance Management Policy
 Unresolved = Issue reported and logged, but problem not fixed
 Resolved = Maintenance / repair work concluded, i.e. problem fixed, but invoice not received
 Completed = Resolved + Invoice received and sent to LL & Accounts

Maintenance Tickets in the last month: _____
 Maintenance Tickets >

Unresolved Maintenance Tickets

Priority	Total # ⁽⁴⁾	# 1 – 2 Weeks Old ⁽⁵⁾	# Older than 2 Weeks ⁽⁶⁾
High ⁽¹⁾			
Medium ⁽²⁾			
Low ⁽³⁾			

⁽¹⁾ Filter on Ticket Priority= High, then (1), (5) & (6)
⁽²⁾ Filter on Ticket Priority= Medium, then (4), (5) & (6)
⁽³⁾ Filter on Ticket Priority= Low, then (4), (5) & (6)
⁽⁴⁾ Total in bottom right hand corner
⁽⁵⁾ Filter on Log Date to before (1 week ago) and / or after or equal to (2 weeks ago)
⁽⁶⁾ Filter on Log Date to before (2 weeks ago)

Follow Up Reminders Not Processed : _____ (attach list to this report)
 Maintenance Tickets > Unresolved > Sort Ascending on Reminder Dates

Outstanding Maintenance Invoices : _____
 Maintenance Tickets > Resolved

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Weekly Portfolio Report - Inspections

Inspections- Done & Not Completed (RedRabbit)

Inspection Type	Done (In Last Week)	Done (More than 1 Week Ago)
Entry	7	7
Exit	0	0
Ad Hoc	0	0

Entry & Exit: Completed = Inspection Done + Signed by both parties + maintenance Tickets Opened + Sent to both parties
 Ad Hoc: Completed = Inspection Done + maintenance Tickets Opened + Sent to both parties
 * Inspections > Inspections Done > Filter on Type = Entry > Sort Ascending on Date & Time
 * Inspections > Inspections Done > Filter on Type = Entry > Sort Ascending on Date & Time
 * Inspections > Inspections Done > Filter on Type = Entry > Sort Ascending on Date & Time

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Weekly Portfolio Report - Inspections

Properties to Let

Totals	Number
H1	
RPMS ¹⁰	
Whiteboard	
To Let for less than 2 weeks ¹¹	
To Let 2 – 4 weeks ¹²	
To Let more than 1 month ¹³	
# Procurements to Let ¹⁴	

¹⁰ RPMS: Applications > Properties TO LET > Filter on Portfolio

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Weekly Portfolio Report – Entries & Exits

Entry WIP

Leases > Lease Management > Current Leases > Filter on Portfolio > Filter on Phase 'contains' 'Entry'

Start Date	Number
Less than 10 days ago	
10 days or more in the past	

Update Lease Phase to Normal ONLY when: Move-in Costs Paid in Full + Entry Inspection Completed (refer Inspections above)

Exit WIP

Leases > Exit Management > Exit Tickets – In Progress > Filter for Portfolio/Agent > Sort Ascending on New End Date

Ended Last Month	Number
Ended Before Last Month	

Update Status to Exit Completed ONLY when Exit Inspection Completed + Repairs Completed + Deposit Endorsed

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Weekly Portfolio Report - Renewals

Renewals

Alerts

Alerts	Number
Rent Increase Alerts ¹³	
Renewal Alerts ¹⁴	

¹³ Leases > Renewal Management > Rent Increase Alerts

¹⁴ Leases > Renewal Management > Renewal Alerts

Lease End Date in the past

Renewal Phase	Number
Renewals WIP ¹⁵	
Renewals Confirmed ¹⁶	
Renewals Completed ¹⁷	

¹⁵ Leases > Renewals > Renewals in Progress > Sort Ascending on Current End Date

¹⁶ Leases > Renewals > Renewals Confirmed > Sort Ascending on Current End Date

¹⁷ Leases > Renewals > Renewals Completed > Sort Ascending on Current End Date

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Weekly Portfolio Report - Renewals

Lease End Date = End of This Month

Renewal Phase	Number
Renewals WIP ¹⁵	
Renewals Confirmed ¹⁶	
Renewals Completed ¹⁷	

Lease End Date = End of Next Month

Renewal Phase	Number
Renewals WIP ¹⁵	
Renewals Confirmed ¹⁶	
Renewals Completed ¹⁷	

Lease End Date = End of the Month After Next

Renewal Phase	Number
Renewals WIP ¹⁵	
Renewals Confirmed ¹⁶	
Renewals Completed ¹⁷	

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Weekly Portfolio Report - Renewals

Arrears Management

Current & New Leases

Amount	Number	Total Value (R1,000's)
Less than R1,000 ¹⁸		
R1000 and more ¹⁸		
Total for Portfolio ¹⁹		

¹⁸ Accounts > Account Balances > Current Lease Accounts > Filter on Portfolio > Filter on Account Balances / Tenant
¹⁹ Accounts > Account Balances > Current Lease Accounts > Filter on Portfolio

Past Leases

Amount	Number	Total Value (R1,000's)
Less than R1,000 ²⁰		
R1000 and more ²⁰		
Total for Portfolio ²¹		

²⁰ Accounts > Account Balances > Current Lease Accounts > Filter on Portfolio > Filter on Account Balances / Tenant
²¹ Accounts > Account Balances > Current Lease Accounts > Filter on Portfolio

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Weekly Portfolio Report - Renewals

RentDoc & Marion Shevelew

	Number
Active LOD's	
Active LOC's	
Evictions in Process	

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Daily Task List

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Daily Task List

PC020 – CHECKLIST - DAILY RENTAL TEAM TASKS

- Office _____ Week Beginning _____
- Rental Support to carry out the tasks as per below daily and mark completed.
 - Completed weekly sheets to be filed for inspection by the Rentals Operations Manager
 - Any requests for information required from the rental agent to be emailed to the agent/s by 10 am daily
 - Agents to provide responses by 2pm daily and Rental Support to update RPMS accordingly
 - Only email communication is acceptable – no verbal updates

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Daily Task List

MONDAY	RS / RA	DONE
Rental Team Meeting	ALL	
Maintenance (PC019 #1)	RS	
Rent Arrears (PC019 #2)	RA	
Exit WIP (PC019 #3)	RA	
Entry WIP (PC019 #4)	RA	
Renewals (PC019 #5)	RA	
TUESDAY		DONE
Maintenance (PC019 #1)	RS	
Rent Arrears (PC019 #2)	RA	
Exit WIP (PC019 #3)	RA	
Entry WIP (PC019 #4)	RA	
Renewals (PC019 #5)	RA	
WEDNESDAY		DONE
Maintenance Follow Up (PC019 #1)	RS	
Rent Arrears Follow Up (PC019 #2)	RA	
Exit WIP (PC019 #3)	RA	
Entry WIP (PC019 #4)	RA	
Renewals (PC019 #5)	RA	
Account Alerts (PC019 #6)	RS	

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Daily Task List - Monday

THURSDAY		DONE
Maintenance Follow Up (PC019 #1)	RS	
Rent Arrears (PC019 #2)	RA	
Exit WIP (PC019 #3)	RA	
Entry WIP (PC019 #4)	RA	
Renewals (PC019 #5)	RA	
Inspections (PC019 #7)	RA	
Properties to Let (PC019 #8)	RA	
Viewing Appointments (PF006 - Viewing Appointment Booking Sheet)		
FRIDAY		DONE
Maintenance Follow Up (PC019 #1)	RS	
Rent Arrears Follow Up (PC019 #2)	RA	
Exit WIP (PC019 #3)	RA	
Entry WIP (PC019 #4)	RA	
Renewals (PC019 #5)	RA	
Weekly Portfolio Report (PF007) to Manager and/or ROM	RS	

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Resources

- PC027 – Monthly Rentals Calendar
- PC020 – Daily/Weekly Rentals Tasks List

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Webinar Review

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Maintenance & Repairs

Resources

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Associated Webinars

<https://shaunluyt.co.za/residential-property-rentals-webinars-on-demand/>

- WEBINAR #1: ARREARS MANAGEMENT – The Right Way!
- WEBINAR #2: RENTAL DEPOSITS & DAMAGES – How to Avoid the Avoidable Disputes!
- WEBINAR #4: INGOING & OUTGOING INSPECTIONS – How to Protect Your Landlords Right to Recover the Cost of Repairing Damages!
- WEBINAR #6: LEASE RENEWALS – Managing Lease Renewals the Right Way!

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Maintenance & Repairs

Need Assistance?

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Other Services

- Rental Training Training
- Rental Team Workshops
- Mandate Review and/or Updates
- Development & Implementation of Policies and/or Procedures

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