

# Tendering for a Property Management Agent

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# Tendering for a Property Management Agent

## BEST FIT

What kind of Managing Agent are you looking for?

Making contact with a prospective agent

Information to provide when making contact

Pick an agent that has aligned values to yours

What goals are you looking to achieve?

Research websites

# Tendering for a Property Management Agent

## BEST FIT

To tender or not to tender

Face to face interviews

Questionnaire to respond to

The handover process

# Tendering for a Property Management Agent

- ❖ The role of the Directors in the handover
- ❖ Best time to switch
- ❖ The Regulatory Status
- ❖ The Qualifications and experience
- ❖ References

# Tendering for a Property Management Agent

- ❖ Letter of Engagement
- ❖ Legally binding
- ❖ Customise the contract

# Tendering for a Property Management Agent

- ❖ Fees
- ❖ Payment terms
- ❖ Add ons

# Tendering for a Property Management Agent

- ❖ **Communications**
- ❖ **Financial and Operational Management**
- ❖ **Levels of reporting**

# Tendering for a Property Management Agent

- ❖ **Competence and experience of Service Charge Collection**
- ❖ **Administration and Secretarial competence and resources**
- ❖ **Buildings knowledge**



# Tendering for a Property Management Agent

- ❖ Stay self-managed or not?
- ❖ Insurance matters