

A PRACTICAL SELF-ASSESSMENT FOR MULTIFAMILY OPERATIONS

Operational agility is not about speed. It is about building systems and workflows that hold up under pressure. This checklist is designed to help multifamily teams identify where manual processes, disconnected systems, and unclear ownership may be slowing operations down. There is no scoring and no automation required. The goal is clarity.

Use this as a working document to spot friction before it becomes a problem.

1. SYSTEM INTEGRATION

- ☐ Core operational systems share information without manual reconciliation
- ☐ Teams are not required to double-enter the same data across platforms
- ☐ Access updates stay aligned with leasing and maintenance workflows
- ☐ Changes made in one system do not require follow-up emails or spreadsheets
- ☐ Operational data remains consistent across teams and tools

2. ACCESS AND CREDENTIAL WORKFLOWS

- ☐ Move-in access follows a consistent, documented process
- ☐ Move-out access is revoked promptly without relying on memory or email
- ☐ Vendor and contractor access is time-bound and centrally managed
- ☐ Temporary access does not linger beyond its intended use
- ☐ Staff changes do not create gaps in access control

3. VISIBILITY AND REPORTING

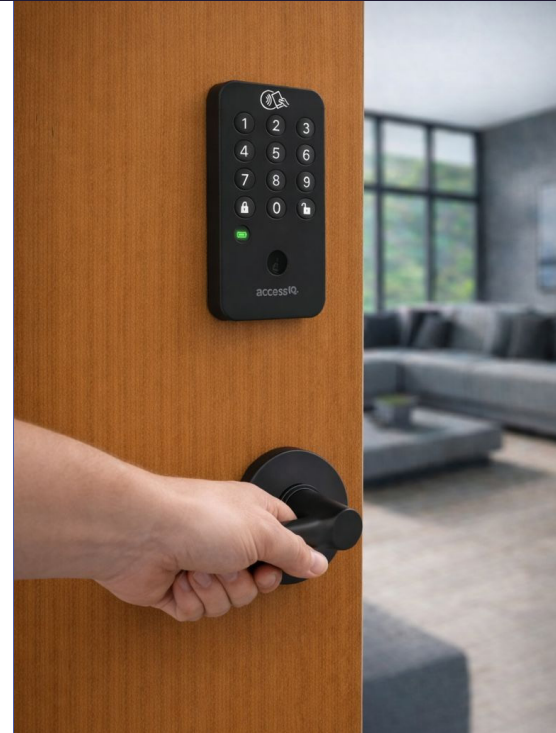
- ☐ Teams can easily see who has access and why
- ☐ Access changes are logged and auditable
- ☐ Pending access requests are visible and trackable
- ☐ Managers can quickly identify exceptions or outdated permissions
- ☐ Reporting does not require manual compilation from multiple systems

4. MANUAL HANDOFFS AND FRICTION POINTS

- ☐ High-volume tasks do not rely on email chains or spreadsheets
- ☐ Fewer than two teams are involved in routine access changes
- ☐ Manual steps are documented and intentional, not workarounds
- ☐ Exceptions are handled deliberately, not repeatedly
- ☐ Institutional knowledge is supported by systems, not required to operate

5. PEAK-SEASON READINESS

- ☐ Workflows hold up during high move-in and move-out volume
- ☐ Temporary staffing or coverage changes do not introduce risk
- ☐ Processes scale across units or properties without breaking
- ☐ Operational bottlenecks are known and planned for
- ☐ Teams feel confident entering peak leasing season



REFLECTION

If leasing volume doubled tomorrow, which workflow would break first?

What manual steps would your teams struggle to maintain under pressure?

NEXT STEP

This checklist is not a pass or fail test. It is a conversation starter. If you identified friction points or gaps, consider which workflows could be simplified first. Small changes often deliver the biggest operational gains.

If you would like a second set of eyes on what you found, we are happy to talk.

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