
Operational Self-Assessment Scorecard

Score seven areas of your property management operation. Check each statement that is true today.

1. Knowledge & Documentation

- Written SOPs exist for all recurring tasks and are accessible to the team
- New hires can find answers to common questions without asking a colleague
- SOPs have named owners and were reviewed in the last 12 months
- Policies are separated from procedures in your documentation
- Your team trusts your written documentation enough to consult it first

Score: ____ / 5

2. Software & Tools

- PM platform features are fully configured and adopted by the team
- Staff do not re-enter the same data into multiple systems
- No personal spreadsheets or workarounds are filling software gaps
- Integrations between PM, accounting, and communication tools work
- Software stack has been evaluated in the last 18 months for fit and cost

Score: ____ / 5

3. Communication Infrastructure

- You know your total telecom spend across all properties
- Your team knows which channel to use for each type of communication
- Critical information reliably reaches everyone who needs it
- Phone lines, internet tiers, and mobile plans audited in the last 12 months
- Communication tools are consolidated, not scattered across platforms

Score: ____ / 5

4. Staffing & Roles

- Every role has a clear, current job description matching the actual work
- The operation runs smoothly when the owner is out for a week
- No single employee absence would meaningfully disrupt operations
- Property managers spend most of their time on management, not admin
- Decision authority is distributed — not bottlenecked at the top

Score: ____ / 5

5. Workflows & Processes

- Key workflows (maintenance, leasing, move-out, renewal) are documented
- The same process is executed consistently across all properties
- You can identify where work gets stuck or delayed in each workflow
- Handoffs between team members are clean with no information lost
- Your team has a way to flag and improve broken processes

Score: ____ / 5

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6. Financial Operations

- Maintenance spending is tracked against budget by property
- Vendor contracts are current and renegotiated within their term
- Late fees, chargebacks, and ancillary revenue applied consistently
- Billing and reconciliation processes are efficient with minimal manual work
- You can identify revenue leakage points in your operation

Score: ____ / 5

7. Resident Experience

- You measure and track maintenance response times
- Residents get consistent answers regardless of who they speak to
- Online reviews reflect operational quality, not just market conditions
- Renewal rate matches or exceeds market benchmarks
- Resident complaints are tracked, categorized, and used to improve ops

Score: ____ / 5

Total Score: ____ / 35

30–35: Strong foundation. Focus on optimization. | **20–29:** Meaningful gaps. Prioritize lowest areas. | **Below 20:** Significant risk. Consider a professional assessment.

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