

Think of Me as Your Coach

Presenting Organized Information is a Game Changer

A coach once said, “The difference between being good and achieving greatness is knowing the Xs and Os and also understanding all the Ys.” In keeping with the sports theme, community managers fulfill a coach-type role, providing boards of directors (the quarterbacks) with the best options for their association, fueled by information from expert service providers (the receivers). The game plan should be not only to provide boards of directors with great options for their community but also to explain the benefits of each option. Thus, a community manager’s job is not to be proficient in everything, but to be an expert in managing. And a great deal of that expertise is related to managing information.

How does this play out when sharing information with a board? For example, at the first meeting with a new board, there should be a conversation between the board and the manager that revolves around expectations. Undoubtedly, one board member will ask the manager for their opinion on a specific issue. An experienced community manager might respond, “Although I am knowledgeable on this issue, the association utilizes a variety of service providers that have expertise in that particular field.” Managers trust their sources to provide accurate information, which they review and organize so it is readily available, and finally, they present the information to the board of directors so they can make informed decisions.

Service Providers: “All-Star” Sources of Information

Community managers are constantly bombarded with an abundance of information. A primary task of any community manager is funneling it down to trusted sources—service providers. Building trust with the companies that work in a community should start at the beginning, meaning the manager will sit down with the service provider to learn about their history and how they do business. How long has the company been in business? Do they specialize in services to associations, or is this their first HOA job? What credentials do the company and/or the individual service provider have? (Hint: Consider hiring a CACM-affiliate member for HOA service needs. They are generally well-versed in association work and are eager to help the manager, the board and the community succeed.

If an association needs work performed in the community, the manager will gather, review and present information to the board of directors. This process allows the board to become comfortable with both the manager’s ability to bring qualified experts to the community and with the companies themselves. Ultimately, problems are

averted when the companies hired by the board are trusted experts in their fields and are determined to do a great job. Taking the time to learn about each company also helps create both short-term and long-term goals for the community and is invaluable.

Here is a real-life example of how a manager assisted a board in providing the “big picture” for a re-roofing project. In this case, the manager met with the roofing company that then provided two maps of the association. The first map showed all the roof repairs within the last five years. The second map outlined the completed re-roofs along with the cost for the remaining roofs. The benefit of these new tools was that it provided the board of directors another option. Roofs could be repaired as done in the past, or they could be completely replaced to reduce recurring repair costs. Additionally, on the community’s new roof maps, the board of directors noticed that a particular roof had been repaired four times within the last five years and that replacing the roof would have been less expensive. The board of directors was able to alter their preconceived mind-set that repairing was the least expensive option.

If the board had only been provided with option A, they may never have become aware of option B. Both options were presented at the same time for consideration, thanks to the perceptive manager. Since implementing this procedure, this particular community’s roof repair costs are down more than 50 percent, and it is all thanks to finding the proper information. The success of every association is in the specifics and, by spending a few minutes talking with the expert, the manager assisted the board of directors in positively redirecting their fiscal future.

Play the Field for Proposals

For large-scale projects that are going out to bid, a manager will typically set up job walks with all the bidding companies at one time. Apples-to-apples tree trimming proposals from multiple companies with a site walk contributes to succinct bids. Understandably, the opinion of how often a tree needs to be trimmed may vary slightly between arborists. In order to be fair to all, the companies and the board of directors, the proposals should be as uniform as possible.

Inviting a board or committee member to participate in a job walk will give them tremendous appreciation for the knowledge of the experts, which leads to more confident business decisions by the board of directors.

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The manager will ensure proposals are thoroughly reviewed before presented to the board in order to meet the community's goals. By spending a few minutes to clarify the "Ys" of each proposal, the manager's attention to all of the details leads to long-term benefits for the community. There is more to every proposal than the company name and the price, so the manager will highlight critical information for the board.

Also, keep in mind that no two proposals are the same. Not all board members have the time to spend analyzing the details as managers will. With the manager highlighting the warranties, scope of work, company background, licensing and insurance coverage for the service company, the board is now armed to make an educated decision.

At this point in the game, we are all in the pros. But, what separates the all-stars is in the details and how those specifics are highlighted. Managers will open up communication with the experts, organize and analyze the information and outline those details for the board of directors. Mission—accomplished!



Based on an article by Kevin Lehman, CCAM.