



**The Training Solution**

Creating A Better Workforce Thru Self-Development

# STAFF PM

2016 Patent Pending

## ABSTRACT

Staff PM will change the world by replacing the need for employment agencies in the property management industry (for apt communities), especially for temp/contract employees. This instant platform (app/software) will supply vetted candidates directly to hiring managers in a less expensive but more accurate and direct way. It is a platform that is scalable to other industries.

**mary bass**

Founder

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## **Executive Summary**

The Training Solution (TTS) seeks to develop and market Staff PM, an app/software program designed to connect property management professionals with hiring managers. Thereby erasing the need for an employment agency and creating a quicker, easier channel for the employment process to take place. A process that also includes drug screening and background checks which are employer requirements. Clients would be able to fill their positions less expensively since the “middle man” is cut out.

Drug screening and background checks are required of employees before being allowed to work at an apartment community. Traditionally, it's less expensive to hire temporary employees via an employment agency due to this cost. Especially since the industry uses temps to “try” them out before making the decision to hire them. The agency is responsible for making sure candidates are drug screened and have background checks before allowing them to go to the client's community. Unfortunately, some agencies do not do this for every candidate while the client remains unaware.

TTS will also provide ongoing continuing education, training and coaching for all positions (online and in-person) for candidates with little or no experience. Some training and education will also keep candidates abreast of legislation and other pertinent topics. Most property management professionals agree that there is a huge need for training and that it is not currently being consistently addressed industry-wide.

Per their clients, the three main employment agencies that specialize in property management in Seattle are not adequately servicing the current market. And they certainly will not be able to do so with the additional 58k units that are coming on board by year end 2020.

Candidates will have an option of purchasing a background check and drug screen from a third-party vendor, after which the test results will be uploaded onto the candidate's profile.

Services will also be marketed to college students and other groups of employees whose skills are easily transferable, thereby increasing the pool of possible candidates.

Mary Bass, founder of TTS, has served 15 years in property management as a Leasing Agent, Assistant Manager, Manager, Regional Sales Director (on the vendor side) and now as an entrepreneur. In her previous position as a Director handling Washington and Oregon for a collections agency, her territory earned about a million dollars in gross sales in four years. She created TTS to empower both employees and employers in the industry that she feels has contributed so much to her personal success.

## **Company Description**

The Training Solution (TTS) created in August 2016, provides streamlined staffing services and training tools to property management companies. Even in this technology-driven society, apartment communities (typically 50+ units) will always need to be staffed by human beings. Ongoing training and continuing education is not only key to preventing “legal events” from taking place but also assists in providing an apartment community that is desired by potential and current residents while decreasing employee turnover costs, which results in more profits for the owner.

Staff PM solves these problems by providing a platform upon which employers and employees can interface and perform the same tasks online, confidentially, as they would with an agency but quicker, more efficiently, less costly and more accurately. Those tasks include providing drug screening and background checks for candidates (who are more apt to get hired if they choose to purchase these services).

This new software technology combined with supportive, flexible training for employees when they need it is designed to support the property management industry in a flexible way that can expand and grow with the it.

## **Market Analysis**

Property management companies use temporary employees frequently when looking to staff their communities so that they and the employee can see if they are a right fit for the job and the property. Up until now, Seattle apartment communities only had a choice of 3 employment agencies – all of whom are mediocre at best. It is hard to supply the increasing demand of filling positions available in property management, especially leasing agents and maintenance technicians.

This demand is going to increase and requires quality trained professionals who can service Seattle’s new residents, many of whom are from foreign countries. The delicate balance of servicing these residents in a manner that is Fair Housing friendly, adheres to management policies that still results in high resident retention rates is even more tenuous.

## **Competition Analysis:**

### **Career Strategies**

Based in California, this company has been in the Seattle market for about 15 years and is the largest employment agency that provides temp and permanent employees to the industry.

They are very disorganized and quite a bit of follow up is needed from smaller client companies and candidates to ensure that positions are filled. The Seattle office experiences quite a bit of turnover. Drug screenings and background checks aren't always done.

But because they were the only provider of this service for so long with almost no real competition, most companies will still call them when in need.

### **Apartment Advantage**

Open since 2003, this is the largest locally owned agency dedicated to the industry. It was until recently owned and operated by one or two people but has changed ownership and expanded to Oregon.

Industry opinion of the owner and their candidates is not high for this company either prior to the change and it still isn't good. But they were the only other choice that managers had to hire staff with possible industry experience. They also now provide training but it doesn't seem to be consistent.

### **Property Staffing Solutions**

This is a newer company, about 5 years old that is owned and operated by two female industry-experienced professionals that focus on providing disadvantaged persons with a job in the industry. One of the challenges they face is providing employees that can pass the background check and drug screening as well as having enough candidates on hand to meet current demand.

Managers have a choice of calling upon full-service staff agencies but they rarely do since experienced candidates and specialized agencies are preferred.

Being able to get temporary help, especially on short notice, has always been a problem since there are so many steps involved in making sure that a candidate can fill a position.

Now hiring managers will have another choice – Staff PM!

## Pricing

Employers typically pay agencies upwards of 2-3K per full-time permanent employees and \$3 to \$5/hour per temporary position. Staff PM's pricing will seem like peanuts to them but will be very profitable for TTS! There are three pricing structures to choose from:

1. Company
    - 1-10 properties \$2500 for 12 months
    - 11-20 properties \$5000 for 12 months
    - 21-30 properties \$7000 for 12 months
    - 31-50 properties \$10000 for 12 months
    - \*1k more for each additional 50 properties
  2. Property
    - \$1250 for 12 months
    - \$625 for 6 months
    - (privately owned)
  3. By Position
    - \$500-\$1000
- Promotion: Free for the first candidate (temp or perm, any position); Year 1 only

The average community size is about 100-150 units. Typically, a staff of 3 to 5 people is needed to operate smoothly. This includes a Manager, Assistant Manager/Leasing Agent, Maintenance Supervisor and a Maintenance Tech. The property's class (A being the best and D being the opposite) will determine how well it is staffed. The larger the property, the larger chance that the Assistant Manager and Leasing position will be staffed by 2 people versus one.

Prices will increase in Year 2.

## **Organization & Management**

The Training Solution (TTS) is a company operating under the form of an LLC (same name as its creator Mary Olivia Bass). Staff PM is a product of TTS.

Currently, Mary Bass is solely operating the company as a start-up. However, once the software is developed and depending on how investment funds are provided, the organization of the company will adhere to whatever form agreed to by the partnership, if necessary.

Departments/functions needed to provide these services include:

- Customer Service - to provide via email except for emergencies (technical assistance etc.)
- Marketing & Sales - Clients: provide ongoing exposure to the market and handles subscriptions

Candidates: ongoing marketing to get new registrations

- Training – to create and manage training and continuing education tools (online and in person)
- Technical Maintenance – of the website including issues, changes etc. (this can function may crossover with customer service)

TTS estimates that staff will be needed once trainings start in Q1/2017.

Drawing from the 15 years in property management and most importantly from the last 4, spent building relationships in the industry on all levels, Mary will introduce this service to a list of her prior clients. She will also perform the bulk of these functions until the company is profitable, at which time additional personnel will be hired.

**Product/Service**

As mentioned, Staff PM is a user-friendly software system that will replace the role of an employment agency in the property management industry and that can be used on a mobile phone in the form of an app or on a computer.

A prototype is currently being developed and will be for presentation purposes by year end 2016.

The following pages is a demonstration of how this system would work to fulfill this purpose.



**STAFF PM**

# STAFF PM

Your Property Management Job Hotline (Goldmine)!!

Join free today!

Are you looking for a job – click [\*\*here!\*\*](#)

Need to fill a position – click [\*\*here!\*\*](#)

Mary

Bass

## Membership Type

- ☐ Candidate – free!
- ☐ PM Company

How did you hear about us?

By clicking Join Now, you agree to our [Terms of Use](#) and [Private Policy](#)

JOIN NOW

## How It Works

### Looking for a job?

#### **Sign Up Free**

Create an account. It's easy.

#### **Create a Profile**

List your skills, upload your resume, opt to get check and/or background background check, upload a photo, list references etc.

#### **Search Jobs**

Find the job that best suits your schedule and skills. Search anonymously or not.

#### **Get Hired**

You are an independent contractor unless you you're hired permanently.

#### **Get Paid**

You will get paid directly by your employer. employee Use our invoices if you're a contractor.

### Looking for a candidate?

#### **Sign Up Free**

Create an account. It's easy.

#### **Create a Job**

Enter requirements such as drug third-party drug and/or

check, references, temp or perm,

#### **Review Profiles**

You can search for staff.

#### **Hire a Candidate**

Get the right person working for right away!

#### **Pay Your New Employee**

Unless you place your new

on your payroll, you will receive an invoice each week that is required to be paid within 10 days of the employees start date.

Access your profile from any device (laptop, smartphone, tablet).

**Let's get started! Choose an option.**

**I Need a Job**

*Find a Position!*

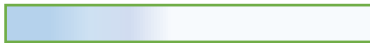
**I Need to Fill a Position**

*Find Candidates!*

**Bio   Resume   Position Desired   Pay/Availability   Background   Drug**

*(Find a Job chosen)*

**My Progress**



**My Bio**

**Bio**

**Profile Title** (optional)

**Resume**

**Position Desired**

**Pay/Availability**

**Background Check**

**Drug Screening**

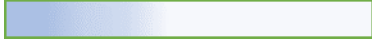
*Briefly describe your experience, why you're an asset to the communities where you may have worked, special skills, years of experience, what type of environment you'd like to work (community and colleagues etc.)*



**Next**

**Bio   Resume   Position Desired   Pay/Availability   Background Drug**

**My Progress**



**Resume**

**Bio**

Upload you resume – click [here.](#)

Resume

**Position Desired**

**Pay/Availability**

Manually type in your resume – click [here.](#)

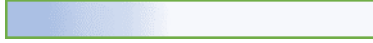
**Background Check**

**Drug Screening**



**Next**

**My Progress**



**Position Desired**

**Bio**

**Resume**

Position Desired

**Pay/Availability**

**Background Check**

**Drug Screening**

**Check as many that apply**

☐ Leasing Agent

☐ Leasing Manager

☐ Assistant Manager

☐ Maintenance Tech

☐ Maintenance Supervisor

☐ Manager

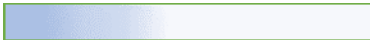
☐ Regional (responsible for 2+ properties)



**Next**

**Bio   Resume   Position Desired   Pay/Availability   Background   Drug**

**My Progress**



**Pay/Availability**

**Salary**

Your employer will pay you no later than 10 days after your start date. We are not responsible for payment but we will tell them how you would like to be paid.

**Payment Types Accepted**

☐ Check

☐ Direct Deposit (recommended)

**Additional Information**

☐ How many miles are you willing to travel?

☐ Do you have your own car?

☐ Desired Hourly Rate Range

☐ Willing to get background/drug checks?  
(recommended – required of most employers)

**Bio**

**Resume**

**Position Desired**

Pay/Availability

**Background Check**

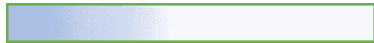
**Drug Screening**



Next

**Bio   Resume   Position Desired   Pay/Availability   Background  
Drug**

**My Progress**



**Background Check**

Background checks are performed by a third-party vendor called Goodhire.com. You will be directed to their website when you click below. There you will set up an appointment with one of their local offices and make all the arrangements needed including payment for your background check on their website. When your results are ready they will be posted into your account up to 48 hours after your request is made) and you will receive an email notifying you.

Prices start at 29.99 (the basic check is recommended).

If the results aren't satisfactory, we recommend you do it again when they are or look for a position that doesn't require any checks.

**Bio**

**Click here to get your background check done.**

**Resume**  
(above)

<https://trueme.goodhire.com/pricing> imbedded

**Position Desired**

**Click here to opt out.**

**Pay/Availability**

(candidate is sent to next screen)

Background Check

**Drug Screening**



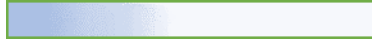
**Next**

(after check is done, candidate will be prompted to return to this website, to the next page)



**Bio   Resume   Position Desired   Pay/Availability   Background Drug**

### **My Progress**



### **Drug Screening**

Drug screenings are performed by a third-party vendor called Nationaldrugscreening.com. You will be directed to their website when you click below. There you will set up an appointment with one of their local offices and make all the arrangements needed including payment for your background check on their website. When your results are ready they will be posted into your account up to 48 hours after your request is made) and you will receive an email notifying you.

Prices start at 39.99. We have worked out a special pricing arrangement on the tests that most employers require and is good for three months unless otherwise required by an employer.

If the results aren't satisfactory, we recommend you do it again when they are or look for a position that doesn't require any checks.

**Bio**

**Resume**

**Click here to get your background check done.**

**Position Desired**

<https://www.nationaldrugscreening.com/Washington.html>

**Pay/Availability**

**Background Check**

Drug Screening



**Next**

(after check is done, candidate will be prompted to return to this website, to the next page)

## **Congratulations! Your profile is complete!**

Please make sure you set up an appointment for your background and screening checks – this will greatly increase your chances of getting hired. Most employers require these checks if you are going to have to enter apartments or deal with money as a part of your job duties.

Now you can search for a job! Answer these questions to get a list of positions available near you for you instantly!

### **Click on Job Title Desired**

(drop down menu of jobs listed  
on page 5)



### **Pay Desired**

(drop down of pay ranges:  
10-15; 16-20,21-25,26-30 per hour)



### **Commute Desired**

(drop down menu – choice of areas  
that encompass King & Pierce  
County or range of miles from  
entered address)



**NEXT**

## **Your List of Job Opportunities**

Click on the position you're interested in to be sent get details and apply!

1. **Leasing Manager, Federal Way, Full-Time, \$16/hour, Temp**
2. **Manager, Des Moines, Full-time, \$21.75/hour, Perm**
3. **Leasing Agent, Kent, Part-time, \$15/hour, Perm**
4. **Leasing Agent, Tukwila, Part-time, \$14/hour, Temp**
5. **Manager, Seattle, Full-time, \$23/hour, Perm**

**Title:** Leasing Manager  
**Community Name:** Great Apartment Community  
**Location:** 777 Fantastic Road, Federal Way, WA 98198  
**Pay:** \$16/hour

**Job Description:**

- Has 2 years of previous work experience in residential property management, retail, sales, or customer service
- Is a highly organized and detail-oriented 'can-do' team player, with excellent communication and customer service skills
- Is marketing savvy and proficient in MS Office (Word, Excel), Google Apps and Yardi software

**MINIMUM REQUIREMENTS:**

High school diploma or equivalency certificate.  
Valid driver's license and an insured, operable vehicle.  
Proficient in speaking, reading, and writing in English.  
Ability to pass a full background check and drug screening (no exceptions).

**DUTIES & RESPONSIBILITIES:**

- Assist Assistant Manager in operation of property in the absence of the Manager.
- Answer the telephone with a smile.
- Establish and maintain the best possible occupancy of the apartment community.
  - Show and demonstrate available apartments
  - Practice professional leasing techniques
  - Be aware of current advertising and market programs for the apartment community, as well as all community rules and regulations, policies, and procedures. Compile information monthly
  - Ensure that a thorough application to rent background check is done on all prospective residents, before approval for occupancy
  - Strive for good resident/management relations, to retain desirable residents
  - Ensure the safety, comfort and privacy of all property residents
  - Be aware of the existing and changing market conditions
  - Be familiar with the competition and surrounding area of the apartment community
- Keep accurate records of resident and property activities.

- Collect and record rent and deposits and ensure safety of money collected
  - Complete all documents required for resident and property files
  - Assist with the credit and background checks
  - Maintain leasing records and enter accounting system
  - Complete all clerical functions requested
- Conduct move-in orientation for new residents.
- Observe the condition of the grounds, buildings and model apartments on a regular basis and report any irregularities or maintenance needs to the Manager.
- Realize the maximum revenue potential of the property.
  - Eliminate lost revenues due to vacancies by timely turnover and a marketing program that will pre-lease apartments
  - Inspect all vacated apartments for accurate costs of turnover and ensure the timely turnover of all apartments
- Assist residents with the reporting and recording of maintenance needs.
  - Enter all maintenance needs into the accounting system
  - Maintain the capital improvement log in the accounting system
- Assist Manager with the preparation of weekly and monthly reports.
- Comply with all company employee policies and procedures.
- Comply with the Fair Housing Laws.
- Oversee resident retention programs.
- Manage daily duties of Leasing Consultants.
- Ensure all phone and physical traffic is entered on daily logs and into accounting system.
- Review guest cards weekly for completeness and follow-up with Leasing Agents when applicable.
- Ensure that internet ads (e.g., Craigslist) are posted daily.
- Check community email hourly, including e-mail in spam filter and respond to all inquiries.
- Conduct monthly leasing meetings and set individual team goals.
- Responsible for implementing weekly leasing tasks per the action plan.

- Perform all functions as directed by the Manager.

Click [here](#) to edit your profile.

**APPLY**

Or to check out the next job, just click below

(the following pages appear when the candidate clicks on “APPLY”)

**NEXT JOB**

(if this option is chosen the candidate is redirected to page 9 but it won't have the first paragraph)



You've chosen to apply for the **Leasing Manager** position at the **Great Apartment Community** located in **Federal Way, WA!!**

*(one of the following messages will pop up)*

**This employer has chosen to make her contact information anonymous. You may not contact the property. If you are chosen, to come in for an interview, they will contact you.**

**Click here to apply for another job  
Or do another search.**

or it may say:

**You may contact this employer to let her know you just applied for this position. The hiring manager requests you send an email and attach a copy of your resume to let her know that you are following up from her posting on Staff PM.**

or it may say:

**This employer has automatically been contacted that you are available for this position. If you aren't contact within 48 hours, you can contact the property.**

or it may say:

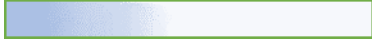
**Click here to be sent to this employer's website to continue applying for this position. You will be prompted to return to our website afterwards.**





*(Find a Candidate chosen)*

**My Progress**



Job Title & Description

**Preferences**

**Community/Company Name  
& Description**

**Temp or Perm. /Hours**

**Pay**

**Start/End Dates**

**Job Title & Description**

Job Title

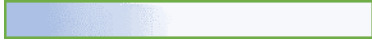
Community Name

Job Description



**Next**

**My Progress**



**Preferences**

**Job Title & Description**

Preferences

**Community/Company Name**

**& Description**

**Temp or Perm. /Hours**

**Pay**

**Start/End Dates**

Background Check

\_\_\_\_ Yes

\_\_\_\_ No

Drug Screening

\_\_\_\_ Yes

\_\_\_\_ No

Other



**Next**

**My Progress**

**Community/Company Name & Description**

**Job Title & Description**

Community Name   & Address

**Preferences**

Community/Company Name  
& Description

**Temp or Perm. /Hours**

Property Management Company or Owner

**Pay**

**Start/End Dates**

etc.)

Community Description (# of Units, class, downtown

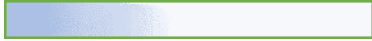
*Text can be copied from the community's website.  
Also, you can give a detailed description of the office  
and work environment here.*



**Next**

**Job Description   Preferences   Community   Pay/Availability   Background Drug**

**My Progress**



**Job Title & Description**

**Preferences**

**Community/Company Name**

**& Description**

Temp or Perm. & Hours

**Pay**

**Start/End Dates**

**Schedule**

\_\_\_ Temp

\_\_\_ Perm

\_\_\_ Interview Required?

Days Needed: M T W TH F Sat Sun

Full-Time:    \_\_ 7-3   \_\_ 8-4   \_\_ 9-5

Other \_\_\_\_\_

Part-Time: \_\_\_\_\_

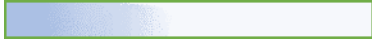
Other: \_\_\_\_\_



**Next**

**Job Description   Preferences   Community   Pay/Availability   Background Drug**

**My Progress**



	<b>Pay</b>
<b>Job Description</b>	_____ \$10 – \$15/hour
<b>Preferences</b>	_____ \$16 – \$20/hour
<b>Community/Company Name &amp; Description</b>	_____ \$21 - \$25/hour
<b>Temp or Perm &amp; Hours</b>	_____ \$26 - \$30/hour
<b>Pay</b>	_____ \$31 - \$40/hour
<b>Start/End Dates</b>	



**Next**

**Job Description   Preferences   Community   Pay/Availability   Background Drug**

**My Progress**



**Job Description**

**Preferences**

**Community/Company Name  
& Description**

**Temp or Perm & Hours**

**Pay**

Start/End Dates

**Start/End Dates**

\_\_\_ **Immediately**

\_\_\_ **Start Date**

\_\_\_ **End Date**

\_\_\_ **Indefinite**



**Post Position**

**Click [here](#) to edit the community profile.** (goes to page 15)

**Your position now posted on live on the site!**

**Search for Candidates**

**Post Another Position**

(The Search for Candidate button will take them back to Post Another Position page).

The following pages are visible when Search for Candidates is chosen.



**Next**

## Let's Find Your Next Ideal Candidate!

Click here to auto populate the following fields.

<b>Position Desired</b>	Leasing Agent
<b>Pay/Availability</b>	\$15 – \$20/hour
<b>Background Check</b>	Yes
<b>Drug Screening</b>	Yes
<b>Car Required</b>	No
<b>Temp/Perm</b>	Temp
<b>Start Date</b>	Immediate
<b>End Date</b>	Indefinite
<b>Availability</b>	Days, One Weekend Day



**Click here for a list of possible employees!**



## List of Candidates That Can't Wait to Hear from You!

All the following candidates meet all the above qualifications:

1. **Laura Brown**
2. **Molly Green**
3. **Penny Smith**
4. **Rhonda Simon**

Click on the any name to see resumes and contact information.

Thee candidates have at least 3 of the requirements you're looking for:

1. **Linda Silver**
2. **Tim Stone**



# Laura Brown

## Resume:

### Professional Experience

#### Apartment Leasing Consultant

2/1/2010 - 10/1/2015

NORTHTOWN TOWERS

Seattle, WA

Completed leasing packages for all rentals and maintained 85%+ occupancy rate; quickly processed denial letters to inform prospective applicants of application rejection.

Assisted in development of marketing plans, Internet and print advertisements, and marketing copy.

Performed administrative duties such as rent collection, communicating with tenants via written correspondence, maintaining property and facilities, and administering lease closings.

Used housing database systems to calculate annual rent totals and recommended rental pricing strategies to maximize profitability and revenue generation.

Addressed, investigated, and resolved tenant complaints and documented action taken; delivered emergency 24-hour on-call services to tenants.

#### Assistant Property Manager

9/1/2007 - 1/1/2010

PINE LAKE APARTMENTS

Kent, WA

Greeted, pre-qualified, and followed-up with prospective tenants; process and verified eligible tenant applications.

Maintained units to ensure market-readiness, coordinated and led apartment tours, answered questions, and highlighted selling features and property amenities.

Collected and recorded application fees and deposits; accurately documented all financial transactions.

Negotiated vendor contracts for community services such as property maintenance and housekeeping.

#### Apartment Leasing Associate

5/1/2004 - 8/1/2007

THE VINEYARDS

Tukwila, WA

Coordinated move-ins and move-outs, and communicated with tenants to achieve maximum service satisfaction.

Wrote and submitted work order requests to maintenance department; followed-up on maintenance process with residents.

### Education

Associate of Science: Business, Cuyahoga Community College, Parma, OH - 2007

Languages: Fluent in English and Spanish

### Computer Skills

Rentroll, Yardi, MRI



**NEXT**

**Click on the email address to email Laura. Contact Information:**

Home: (123) 456-7890 | Cell: (123) 456-7890  
email@example.com

**Contact via Staff PM click here.** An email will be sent automatically. We recommend that you also follow up with a phone call for immediate needs.



**Next Candidate**

**Email sent to candidate:**

Hi Laura!

An employer looking for staff near you has just inquired about your availability on Staff PM. Go to the website now and let them know you want it!

<http://staffpm.com/employercontactrespond/yes>

If you're not interested, please be courteous and click here so that the Manager knows immediately.

<http://staffpm.com/employercontactrespond/yes>

This will let the employer know, that is, if you haven't spoken already. A reminder on the site will also pop up for the employer when they log in.

## **Marketing & Sales**

### **Marketing**

Staff PM is being developed and marketed to property management companies that are based and/or have communities in the Seattle area. Future expansion plans include Oregon and California by the end of year three. And eventually across the country by the end of year five.

Once software development is underway the following marketing campaign will be launched with a 7-point approach:

- A presentation piece demonstrating Staff PM on a cell and/or computer will be used to sell the app to potential clients from Mary's client list (40+ property management companies) and industry referrals
- A direct mail postcard piece targeting the prospect's portfolio that speaks to both candidates and employers, (sent at least 2x each quarter).
- Marketing/training seminars (1-2 hours) held at local area colleges/libraries/area locations. (Two to three times a month or as necessary).
- Digital links with partner property management vendors (Onsite etc.)
- Presence at industry events to be exposed further to decision makers (conferences etc.)
- Ads in Onsite (oldest industry local newspaper) and online sites (i.e. Washington Multi-Family Housing Association)
- Press releases sent to appropriate media sources to secure write ups/articles and/or speaking engagements and interviews

### **Sales**

Additional sales staff will be hired as needed, as the business grows and makes a profit. A part-time person will be hired to assist with the seminars as needed. Sales presentations will be made via phone, webinar, in person or at events to groups. Mary will initially spearhead sales and marketing efforts, which will include hiring any additional services and/or manpower required and then manage those operations once additional salespeople and other personnel/vendors are hired.

Sales will be focused on property management companies on the corporate level as well as the site level. Once managers start using the service they will "sell" it to their higher ups and vice versa.

The activities needed to accomplish the abovementioned marketing goals are as follows:

- Contacting every company (corporate level) on the client list until an appointment is set up to do a presentation and/or communication is made to managers that they can start using the service. We are also given permission to contact. Once the first free candidate has been hired, then the company will decide to subscribe.
- If corporate decide that they want the properties to make that decision, we would sell directly to the properties and no longer contact corporate until when high usage on the property level is seen. Corporate will be contacted to subscribe because it's much cheaper than the other payment options.
- Develop and send out direct mail piece to all Seattle area properties to get them to register for the property as well as sign up as candidates.
- Develop and send out press releases to a rotating list of local 20+ media sources.
- Develop ad campaign to reach college students via events at the college and/or other campus advertising vehicles. Five major local colleges will be targeted each quarter.
- Securing digital links with vendor partners
- Seminars to be held at least once a month to attract additional labor to the pool of candidates as well as train them
- Register for Washington Multi-Family Housing Association (WMFHA) events that are well attended by decision makers as well as advertise on their website

## **Sales/ Marketing Calendar**

### **Q4/2016**

Staff PM is funded and software development begins.

### **Y1/2017**

#### **GOALS**

1. Penetrate Seattle market
2. Make \$100k+ in sales by securing 30+ property management company clients (20 @ \$2500 and 10 @ \$5000)
3. Make an additional \$50k from clients who choose to pay by position

### **Q1/2017**

- Direct Mail Piece starts to hit properties of first 20 prospect companies are targeted
- Ads hit WMFHA and Onsite newspaper (distributed quarterly)
- Prospects contacted via phone until appointment is secured
- Attend WMFHA events: Tapas & Topics (free networking), Membership Luncheon, EdCon and Emerald Awards
- Advertising to college students begin (newspaper, intranet) and/or events
- Secure meeting locations to start late Jan/early Feb
- Press Releases introducing Staff PM are sent – first week of Jan
- Visits made to largest of properties (top 5) in each of the targeted prospect's portfolio
- Sponsor maintenance events (class lunches etc.)

### **Q2**

- Next 20 targets are added to prospect list to call on (those not subscribed are still being contacted)
- Direct piece hits properties
- Attend WMFHA events: Tapas and Topics, EdCon (2<sup>nd</sup> largest industry conference in WA), National Apartment Housing Day, Membership Luncheon, Maintenance Summit
- Property visits to new targets
- Seminars begin – 2 per month

- Press releases sent announcing popularity of Staff PM and events where they can find out more info (networking, events etc.)
- All other scheduled advertising continues
- Sponsor maintenance events (class lunches etc.)

### **Q3**

- Next 20 prospects are added to list to call on (those not subscribed are still being contacted)
- Direct piece hits their properties
- All other scheduled advertising continues
- Property visits to new targets
- Additional press releases sent to those sources not appeared in yet
- Seminars continue – start doing in Pierce County (as demand directs)
- Attend WMFHA events: Tapas & Topics, Business Exchange (speak directly to top level VPs for a few minutes each), WA Apt Outlook Forecast
- Sponsor maintenance events (class lunches etc.)

### **Q4**

- Next 20 prospects are added to list to call on (those not subscribed are still being contacted)
- Direct piece hits their properties
- All other scheduled advertising continues
- Property visits to new targets
- Additional press releases sent to those sources not appeared in yet
- Seminars continue
- Attend WMFHA events: Tapas & Topics, Holiday Social
- Sponsor maintenance events (class lunches etc.)



## **Y2/2018**

### **GOALS:**

1. Introduce Staff PM to Oregon.
2. Join and attend Multifamily events.
3. Utilize all marketing avenues as used in the Seattle market.
4. Hire permanent staff or vendors to assist in operations and marketing.

## **Y3/2019**

### **GOALS**

1. Introduce Staff PM to California (SF and L.A.).
2. Join and attend association events.
3. Utilize all marketing avenues as used in the Seattle market.
4. Hire permanent staff or vendors to assist in operations and marketing.

## **Y4/2019**

### **GOALS**

1. Introduce Staff PM to all states West of Rockies.
2. Join and attend association events.
3. Utilize all marketing avenues as used in the Seattle market.
4. Hire permanent staff or vendors to assist in operations and marketing.

## **Y5/2019**

### **GOALS**

1. Introduce Staff PM to all states East of Rockies.
2. Join and attend association events in major market.
3. Utilize all marketing avenues as used in the Seattle market.
4. Hire permanent staff or vendors to assist in operations and marketing.

### **Financial Projections**

	<b>Annual Sales</b>	<b>Clients (subscriber/pay by position filled)</b>
<b>Y1/2017</b>	150k+	30/50
<b>Y2/2017</b>	350k+	60/100
<b>Y3/2017</b>	450k+	90/200
<b>Y3/2017</b>	750k+	120/300
<b>Y5/2017</b>	1M+	150/400

These are conservative numbers. Currently there are 77 property management companies that are members of WMFHA representing almost 1k units as of August 2016. This secondary list (in addition to Mary's prospect list composed of 40+ companies) will be the other main source for new clients. This is a small percentage of all property management companies doing business in Seattle. There are also many small local companies that are rapidly expanding, as well as companies based outside Seattle, who are not members of WMFHA yet.

In other words, there is and will continue to be an increasing demand in the industry in Seattle for a very long time. City planners predict that the Seattle area will grow to the size Queens by then, about 7 million people by 2035. Currently there are about 10k people moving to Seattle every month.

## **Funding Request**

The following is a list of startup costs that would cover Staff PM for the first year. Based on sales projections, TTS will be able to pay back in full funding received in Q4 2016 by the end of Year 2, 2018, possibly well before then. No additional funding will be needed thereafter since the company will be profitable.

### **Costs:**

1. Technical – app/software	40k
2. Marketing	
a. WMFHA	5k
b. Candidate Training	10k
c. Direct Mail	20k
3. Staff – assist with seminars, customer service via email	2k
4. Other – flyers, office supplies etc.	5k
5. Mary Bass – to fund	10k

Total Required:	\$82k
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<b>Total Requested:</b>	<b>\$72k</b>
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## **Mary Bass**

### **EXPERIENCE**

#### **National Credit Systems, Inc.; (based in) Atlanta, GA**

Regional Sales Director, Washington & Oregon March 2012 – May 2016

- Initiated and built strong client base of 2k, worth almost \$1M in sales (collections) within 4 years
- Worked from home independently to market company services to the industry in both states (sponsoring events, attending conferences/meetings, cold calling etc.)

#### **Hunt Pacific Management; Kirkland, WA**

Assistant Property Manager, 120 units November 2010 – March 2012

- Brought occupancy to 99%; maintained for the last 7+ months resulting in higher rental and renewal rates

#### **The Stratford Company; Seattle, WA**

Property Manager, 164 units (3 properties) October 2008 - July 2010

- Managed operations of 3 buildings, including vendor scheduling and maintenance personnel, singlehandedly while supervising maintenance team of two
- Composed the budget for each building and adhered to monthly financial guidelines
- Average 87% leased at all buildings
- Report to Regional Director and the Founder monthly to discuss Executive Summaries that were distributed to investors that I authored
- Consistently met deadlines and provided excellent customer service to residents
- Raised occupancy & income at two buildings to the highest ever recorded since their purchase
- Marketed buildings to create traffic via all approved Internet avenues daily, weekly and monthly

#### **Delafield Fund; New York, NY**

Executive Assistant November 2005 - September 2008

- Coordinated activities and performed all tasks in a fast-paced environment needed to support two Managing Partners, the COO and 2 Associates
- Field, track and respond accurately and clearly to client inquiries (wire transfers, personal financial issues, tax related issues etc.) while adhering to compliance and legal policies
- Developed and maintained electronic client files online for easy access and resulted in lowering storage fees

- Multi-tasked under pressure with a high degree of accuracy

**Property One Solutions; Seattle, WA** February 2005 - September 2005

- Independent Contractor - various properties

**Avalon Bay; Seattle, WA** - 100 units

**Assistant Manager/Leasing Agent** June 2004 - January 2005

- Raised occupancy to 98% at above market rents within a month

**Con Am; Seattle, WA** - 386 units

**Assistant Community Director** February 2003 - June 2004

- Raised occupancy from 79% to 93% in 5 months
- Organized and managed property functions in a budget conscious, deadline-oriented, profitable manner
- Acted as accountant by performing all bank audits, entering rent payments, sending three days with follow up, ensuring that monthly postings were accurate, making daily deposits, entering bills to be paid while making sure that the property was within budget
- Marketed property by ensuring all Internet avenues were updated regularly
- Directed team of eight

**AIMCO; Aventura, FL** - 180 units June 2002 - January 2003

**Leasing Agent**

- Raised occupancy level from 93% to 98% at market prices and maintained high renewal lease rate
- Assisted in account payables

**Skyjet; San Francisco, CA**

**West Coast Sales Director** January 2001 - January 2002

- Initiated 12 state territory and sold 1 million plus in jet charter sales after planning and executing a well-defined business strategy that I developed
- Cold called and presented to Executive Assistants, Concierge and Business Associations, Travel Agents daily

**Les Concierges; San Francisco, CA** March 1998 - January 2001

**Concierge Manager**

- Ensured that team of 6 made travel and other arrangements for executives, high-level management, royalty and other American Express Platinum Card Members that included chartered jet itineraries and various personal requests accurately and timely

**Licenses:** Series 6, 7 (2005); WA Real Estate License (2004)

**Skills:** Yardi, FOCUS, Rent Roll, Foundation (AMSI equivalent), 2007 Microsoft Word (Excel, Outlook, Access, PowerPoint), Lotus, Concierge-quality Customer Service, Sales, Account Management, Presentation, Bookkeeping

**Education:** Fashion Institute of Technology, New York, NY  
Bachelor of Science - Marketing Communications  
Associates - Fashion Buying & Merchandising

## **Appendix**

3/21/16 Puget Sound Journal

Washington Apartment Outlook 2015 & 2016 hosted by WMFHA

Fellow industry vendor colleagues