



# Property Manager's Automation Readiness Checklist

Feeling bogged down by repetitive tasks in your property management business? This checklist helps **Canadian property managers** like you quickly identify time-consuming processes, potential error points, and prime opportunities where smart automation can save you significant time, reduce costs, and help you scale more effectively.

## How to Use This Checklist

1. Review the common process areas below (Onboarding, Rent Cycle, Maintenance, Communication).
2. Check the box [ ] next to each statement that accurately describes your current manual process (Notion should convert these to interactive checkboxes).
3. For sections with a pain rating, consider your estimated level (Low / Med / High).
4. Tally your checks/high pain points at the end to gauge your automation potential.

## **Section 1: Tenant Onboarding & Leasing**

- Manually collecting application details and typing them into your system?
- Manually sending requests or logging into separate platforms for background/credit checks?
- Manually drafting standard lease agreements or addendums for each new tenant?
- Handling lease signing primarily via printing, physically signing, scanning, and emailing?
- Manually sending standard welcome emails or move-in instructions to new tenants?

*Self-Assessment - Overall Onboarding Pain Level: Low / Med / High*

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## **Section 2: Rent Collection & Arrears**

- Manually sending individual rent payment reminders each month?
- Manually checking bank statements/records to track who has paid?
- Manually calculating applicable late fees based on lease terms/rules?
- Manually drafting and sending formal late payment notices when required?
- Spending significant time (>5 hrs/month?) actively chasing late payments?

*Self-Assessment - Overall Rent Cycle Pain Level: Low / Med / High*

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## Section 3: Maintenance Coordination

- Primarily receiving maintenance requests via unstructured phone calls, texts, or emails?
- Manually logging these requests into a spreadsheet or work order system?
- Manually contacting and assigning jobs to specific vendors or internal technicians?
- Manually following up with vendors or tenants to check on job status or completion?
- Finding it difficult to quickly access maintenance history for a specific unit or property?

*Self-Assessment - Overall Maintenance Pain Level: Low / Med / High*

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## Section 4: Communication & Reporting

- Spending significant time (>5 hrs/month?) manually compiling data for routine owner reports?
- Manually creating task lists or assigning duties for property turnover/listing prep?
- Relying on manual calendar checks or memory for tracking important dates (lease expiries, inspections)?
- Frequently answering the same basic tenant questions (e.g., office hours, payment methods) manually?

*Self-Assessment - Overall Comms/Reporting Pain Level: Low / Med / High*

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# Interpreting Your Results

How many boxes did you check across all sections?

- **0-5 Checks:** You likely have some solid processes, but targeted automation in key areas could still provide significant efficiency gains.
- **6-12 Checks:** Manual tasks are likely creating noticeable drag. There are clear opportunities to save substantial time and reduce errors through automation.
- **13+ Checks:** Manual processes are significantly hindering your efficiency and scalability. Automation could be transformative for your business.



Areas where you checked multiple boxes OR feel the pain level is 'High' are often the best candidates for your first automation project to see the quickest ROI.

## Ready to Stop Wasting Time and Start Automating?

At WorkflowLeaf, we specialize in building practical, custom automation solutions for **Canadian property managers** to solve exactly these kinds of challenges. We help you eliminate repetitive tasks, save valuable time (**~15 admin hours/month** estimate), and typically see positive initial impacts within **6-8 weeks**.

Let's discuss your specific results from this checklist and explore tailored solutions for your business.



[Book your FREE 15-minute consultation](#)

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