

Market Differentiators



**WHAT MAKES FIRSTSERVICE RESIDENTIAL ABOVE
THE OTHERS FOR YOUR BOARD AND COMMUNITY?**



The Best People!

The Best People

► IN THE PROPERTY MANAGEMENT INDUSTRY

Discover how FirstService Residential became the property management leader in the industry

It's got something to do with our people.

Strongest Leadership. The FirstService Residential Executive Leadership Team brings over 100 years of experience to the table in association management, real estate, operations, and finance. We have the most experienced and capable Regional Directors in the marketplace leading each association management team.

Property Management Talent. FirstService Residential has the most credentialed, capable, experienced, and highly trained Association Managers in the Minnesota marketplace.

Smaller Portfolios. Each of our Association Managers have a manageable account portfolio so they are able to spend more time with your Board and your community.

Specialized Professionals. Our expert client support specialists provide professional, skilled assistance with collections, client insurance renewals, production of disclosure documents, client investments, centralized contracting, client accounting, as well as administrative and operations assistance to help your association thrive!

Best Practices. Through the years FirstService Residential has grown a national presence. Our Association Managers draw from the experiences and expertise of our professionals across the country. We share best practices to serve you and your community better than any other.

Best Insight and Support. FirstService Residential believes it's not enough for an Association Manager to simply execute what a Board decides. We help prepare your Board to make good decisions and create engagement with your community around those decisions. We impart insight and perspective from our vast experience, and we are a strong support for your Board so that you can focus on governing.

FirstService Residential Minnesota Leadership Team:

Back row (L to R): Sally Andrist, Director of Human Resources; Mark Gittleman, President; Shaun Zavadsky, Vice President, Community Management; Front row (L to R): Mike Laukka, Senior Vice President; Andy Gittleman, Executive Vice President; and Tammy Johnson, Vice President, Finance.



The Best People

▶ ARE DEVELOPED AND TRAINED



Associate Development

Recruiting, developing, and training our Associates to serve you and your association

- We employ seven full-time human resource staff to support the recruiting and training of all our associates
- Our formalized training and on-boarding plans ensure our associates access our collective knowledge and years of experience to serve as your Board's advisor and your day-to-day on-site needs
- Associates engage in a performance management tool that builds on success through goal setting and professional development
- We host Community Association Institute (CAI) continuing education at our corporate office to equip our Association Managers with industry certifications
- Our servant leadership style creates a culture of service
- We review our core values daily and view our service in the context of our mission, values, and commitments to our clients

Board Education

We empower Board members with effective training

- Board members receive free training led by industry experts
- You'll learn how to run your association more effectively and efficiently through training seminars about Board basics, insurance, legal issues and trends, reserve studies, project funding options, maintenance planning, budget development, rule enforcement, and more



The Best People

▶ ACROSS THE BOARD

Credentialed Community Leaders

Highest number of credentialed Association Managers in the Minnesota market

- XX have their MN real estate license
- 30 have their CMCA certification
- 37 have their Association Manager Specialist AMS designation
- Five have their PCAM designation—the highest in the Twin Cities marketplace certified through the Community Association Institute
- Internal audits are conducted to ensure that our Associates' credentials never expire

Centralized Contracting

Freedom to choose with the power of contract negotiation in your corner

- You choose your vendors
- We leverage contract negotiation for you to obtain better pricing and terms with standard contract forms
- Centralized control ensures that important contracts do not fall off the radar or are inappropriately controlled by vendors





Property Services

Employee-based property service affiliate, Gittleman Construction & Maintenance, is there when you need them—with a smile!

- Our skilled and trained technicians are employees (not subcontractors) who are also trained in community association skills such as customer service and communication
- Our skilled technicians offer a full array of services: general maintenance, drain cleaning, plumbing, electrical, and low voltage
- Our skilled service personnel are managed by full-time dispatchers
- Gittleman is a helpful resource to service both association and homeowner needs
- Our team is available 24/7 for emergencies

24/7/365 Customer Care

Our Customer Care professionals can be reached—days, nights, holidays, and weekends—at no additional charge

- Never wait for answers when you talk with our 24/7/365 Customer Care Center professionals
- Emergency or not, you can connect with our responsive Customer Care professionals around-the-clock and it won't cost you more
- Request documents, report an emergency, or inquire about a recent notice
- Your customer care call creates a log history for your Association Manager to follow up
- Make a payment or address common area amenity or service needs

Facilities Management

Our people save you time and keep your property looking good and functioning well

- We oversee the day-to-day maintenance of your buildings and grounds
- We manage your outside vendors to ensure that your repairs are completed on-time and on-budget
- We utilize client protective contracts to properly manage your risk



The Best People

► DEVELOP EASY TOOLS FOR BOARDS & RESIDENTS

CONNECT

Our comprehensive communication + management software gives you access to people, tools, and information

- Interact with Board members, residents, and Association Managers
- Take care of business any time on any Internet-enabled device
- Integrate with accounting, work order management, and homeowner closings
- Make more informed decisions using the organized data management system
- Pay association fees
- Initiate service requests
- Utilize a customized community website
- Access data and analysis tools
- Archive association records including minutes, financial statements, communication, and contracts



Click Pay

Our online bill payment platform that accelerates your bank transactions by an average of five business days

- For residents, Click Pay means no more late fees stemming from delayed payments
- For Association Managers, Click Pay means reduced wait times to receive payments quicker

AvidXchange

Benefit from a web-based system to manage your community's entire accounts payable process

- Track, code, and approve all association invoices which provides you with a complete audit trail
- Eliminate delays, provide security, and transparency
- Mail payments from a centralized location directly to the vendor

The Best People

► DEVELOP SERVICES THAT HELP & PROTECT BOARDS

FirstService Financial

Our banking and insurance products help your Board fulfill their fiduciary duties

- Facilitates banking transactions, ensures full FDIC protection of funds, and provides free insurance reviews
- Leverages institutional relationships to maximize interest rate earnings
- Monitors bank rate to maximize interest earning opportunities for high-earning money market accounts or certificates of deposit
- Creates investment ladders for clients on request for long-term investing

Positive Pay

Fraud protection

- Matches the account number, check number, and dollar amount of each check presented for payment against a list of checks authorized and issued by the company
- Daily process

The Best People

► LISTEN TO YOU & COMMUNICATE WHAT'S IMPORTANT

Satisfaction Survey

Seeking your feedback to serve you even better!

- Our annual customer-experience survey is conducted through each Board to gauge satisfaction and better understand our clients' needs
- All survey feedback is analyzed by our senior leadership and cross-functional teams to create better processes and solutions for our customers
- Our employee-satisfaction survey is conducted annually to drive HR policy decisions and business planning

Recurring Updates

Our project tracking system builds trust

- Board members receive summaries on an agreed upon schedule with important updates on projects, actions, and activities in the community

Community Connection

Quarterly client newsletter keeps you in the loop

- Learn about Minnesota association management issues, best practices, and initiatives
- Discover upcoming Board training opportunities
- Gain insights about local case studies
- Hear from Minnesota leadership
- And more!



The Best People

► HAVE HEARTS FOR OTHERS



#FirstServeOthers

Our Social Purpose means...

- We are a culture of caring and are committed to social action
- We contribute \$25,000 annually to the Minneapolis Foundation through Grants for Community Excellence in neighborhoods we serve
- We give time for our associates to volunteer in the communities they work in
- We help our associates in times of need through our grant program

Visit www.oursocialpurpose.com

Our 2019 CAI-MN Vision Award
WINNERS & FINALISTS



Maggie Mahmood
Association Manager
ABOVE AND BEYOND AWARD
WINNER



Bill Hauge
Association Manager
Grant Park Condominium Association
OUTSTANDING COMMUNITY-BUILDING
BY AN ASSOCIATION AWARD
WINNER



Jessica Hamilton, AMS
Association Manager
EXCELLENCE IN SERVICE AWARD
WINNER

The Best People
IN MINNESOTA PROPERTY MANAGEMENT



Allison Renslow, AMS
Association Manager
EXCELLENCE IN SERVICE AWARD
FINALIST



Matt Barker
Association Manager
ROOKIE OF THE YEAR AWARD
FINALIST



Erin Basavage
Association Manager
ROOKIE OF THE YEAR AWARD
FINALIST