

# How to Hire a Managing Agent



## Questions

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This document has been designed to support Residents' Management Companies, Right to Manage Companies and Property Developers in making an informed and confident choice when appointing a Property Management Company. It highlights the key questions and considerations that should be explored when evaluating any prospective Managing Agent.

We have included our contact details on the final page should you wish to learn more about how Cleaver Property Management can add value, deliver proactive management and support the long-term success of your development.

## 1 HOW MANY BLOCKS DO YOU MANAGE?

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This question is key to understanding both the experience of a managing agent and their ability to deliver a consistently high level of service. While an established portfolio demonstrates credibility, it is equally important to ensure that service levels are not diluted by overextension. We recommend asking this question alongside: *"How many Property Managers do you employ?"* to assess how effectively workloads are structured and managed.

## 2 ARE YOU A MEMBER OF A REGULATED PROFESSIONAL BODY?

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Professional accreditation is a strong indicator of a managing agent's commitment to best practice, accountability and ongoing professional development. The Property Institute (TPI) is the leading professional body for residential managing agents in England and Wales, promoting high standards of leasehold management through training, guidance and professional regulation

## 3 ARE YOU FULLY INSURED?

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Insurance may not be front of mind until an issue arises, but it is essential when it matters most. It is critical to ensure that any company appointed to manage your property holds appropriate and adequate insurance cover. This provides reassurance, protects all parties and demonstrates a responsible approach to risk management. In addition, Confirming membership of a recognised professional body also provides added reassurance of professionalism and compliance.



## 4 WILL WE HAVE A DIRECT POINT OF CONTACT?

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It is important to understand whether you will be assigned one or two dedicated contacts responsible for the day-to-day management of your property. Having clear points of contact promotes effective communication, continuity and accountability, while also allowing a strong working relationship to develop with those entrusted with the care of your property.



## 5 HOW OFTEN DO YOU CONDUCT SITE VISITS?

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Regular site visits form a core part of effective property management. These inspections enable the Property Manager to identify maintenance requirements, monitor standards and ensure contractors and residents are fulfilling their responsibilities. A proactive site visit schedule helps protect the long-term condition and value of the building.

## 6 HOW MUCH INPUT WILL BE REQUIRED FROM US?

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Successful property management is built on collaboration. While a managing agent should be capable of operating proactively and independently, the strongest outcomes are achieved through open communication, shared objectives and a positive working relationship with clients.

## 7 WHAT IS YOUR APPROACH TO CUSTOMER SERVICE?

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Customer service standards vary significantly across the industry and not all managing agents operate to a clearly defined framework. It is therefore worthwhile to ask whether a company has a formal customer service philosophy or client charter and how this is embedded into their day-to-day operations

## 8 DO YOU EMPLOY SPECIALISTS?

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A Property Management Company should have access to specialist expertise, whether in-house or through carefully selected third-party providers, to deliver the services your property requires. Where third-party contractors are engaged, the managing agent should ensure appropriate due diligence is carried out, including obtaining proof of Public Liability insurance before any work is undertaken at the property.

## 9 WILL YOU TAKE THE TIME TO UNDERSTAND US AND OUR SPECIFIC NEEDS?

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This should be the first stage of any managing agent's appointment process - well before a proposal is submitted. A reliable managing agent will take the time to understand you, your property and your priorities to ensure the services provided are both appropriate and comprehensive. Key considerations may include whether the building is listed, the presence of specialist facilities such as lifts or swimming pools and the size and complexity of the grounds. It is essential that the managing agent you appoint has the experience and resources to deliver a fully tailored service.



# 10 HOW DO YOU DEAL WITH BREACHES OF A LEASE?

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Managing lease breaches can be complex, but an experienced managing agent will have clear and effective procedures in place. Whether the issue involves unauthorised pets or the storage of personal belongings in communal areas, it is important to be confident that breaches will be addressed promptly, fairly and professionally, in accordance with the terms of the lease.

# 11 DO YOU OFFER AN OUT OF HOURS SERVICE?

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In the event of an emergency maintenance issue, it is important to know whether your managing agent can respond outside of normal office hours. Out-of-hours services are often provided through specialist third-party providers, but having a clear and reliable process in place is an important consideration when appointing a Property Management Company

# 12 WHAT IS YOUR FEE STRUCTURE?

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Understanding what you are paying for and how fees are structured, is essential. A transparent and trustworthy managing agent will clearly explain their fee structure and provide a detailed breakdown of the Service Charge budget, allowing you to see exactly what services are included and how your money is being managed.

# 13 CAN YOU PROVIDE ANY CASE STUDIES?

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In addition to testimonials, case studies can offer valuable insight into a managing agent's experience and capability. Asking for examples of previous work, including how complex or challenging situations have been handled, can help demonstrate a managing agent's practical expertise, problem-solving approach and ability to deliver effective outcomes.

# 14 DO YOU HAVE TESTIMONIALS OR CLIENT REFERENCES AVAILABLE

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Independent feedback can provide valuable insight when selecting a managing agent. While many companies will present themselves positively, up-to-date testimonials or the opportunity to speak directly with existing clients can offer a more accurate and reliable perspective on service quality and performance.

# 15 WHAT NOTICE PERIOD DO YOU REQUIRE?

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The notice period should be clearly set out in the contract between you and your appointed managing agent. However, it is sensible to confirm this at an early stage so you have a clear understanding of the contractual terms and flexibility available to you.

# 16 WHAT MAKES YOU UNIQUE?

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Be cautious of vague or generic claims such as "quality," "value," or "commitment," which are often used across the industry. A truly differentiated managing agent should be able to clearly articulate what sets them apart — ideally with a response that begins with "Only we can..." and is supported by meaningful evidence.

So, there you have it — a selection of key questions designed to help start meaningful and informed conversations with prospective Managing Agents. If you would like to ask Cleaver Property Management any of these questions, please contact us using the details below. A member of our Property Management team will be pleased to carry out a free, no obligation review of your requirements and answer any additional questions you may have.