

HOW TO MANAGE A MANSION™

Workbook & Checklist

The Complete Guide to Starting Your Online System



ESTATE
MANAGEMENT
SYSTEMS



WHY CREATE AN ONLINE SYSTEM?

Do you manage the lives and assets of high-net-worth families, or are you a homeowner needing a system to grow your real estate portfolio? Do you currently have a staff or hope to hire help in the future?

Paper house manuals, notebooks, Post-its, Google Docs, and online calendars aren't cutting it. These outdated methods have many limitations when sharing information with your staff and tracking details.

An online system will allow you to download all of the information in your head, computer, notes, and contractors' proposals, into one system so you can share them with others who can make your life a little easier. You'll be able to calendar proactive tasks, assign them, track progress, and communicate with people who make your life easier.

A woman with dark hair, wearing a blue denim shirt, is looking down at a silver smartphone she is holding in her hands. The background is slightly blurred, suggesting an outdoor setting.

WHY ESTATE MANAGEMENT SYSTEMS?

Private servers, private software companies, and other generic project management software programs are all viable options. They are good and very similar to what EMS provides.

However, our system was developed by a former estate manager, Kelly Fore Dixon, while working for some of the wealthiest families in the world, specifically for her low-tech field staff to use on their phones.

Our criteria for building your system is that everyone should be able to view their tasks, complete items, and communicate with team members, all without watching a single training video.

Not only will you be able to capture your household data, but our system has the flexibility to add:

- Event planning and travel
- Pet care directives
- Culinary preferences
- Personnel management and recruitment
- Fleet management and vehicle maintenance
- Caregiver scheduling
- Guest preferences
- Capital improvements, redecorating, and whatever else meets your needs – for one or multiple properties.

IS HOW TO MANAGE A MANSION™ RIGHT FOR YOU?



Our unique approach is flexible, inexpensive, and fun to use.

Six easy steps will set you up with a practical online system that will become a single hub for everything needed to manage your home and your life.

1. **Select one or all of our modules.**
2. **Download our templates**, or use your own.
3. **Watch our training videos.**
4. **Collect your personal and household information** and outline maintenance tasks.
5. **Upload everything into Trello.com.**
6. **Share the information.**



HOW THE MANAGE A MANSION™ SYSTEM HELPS YOU:

- Select only the modules you need to manage information for the family, real estate, and staff.
- Develop your system with our guidance through training videos and house manual templates.
- Track progress on every household task and from your team.
- Share communication all on one platform with a history of those conversations.
- Manage your entire team from anywhere.
- Capture all the details of your valuable assets in one place.

WHY TRELLO.COM?

- Trello has 50 million users and translates into 21 different languages.
- Monthly user fees are very reasonable (\$10/month/user).
- When staff turnover occurs, immediately remove their access to your data.
- Two-step login verification is available.
- Their online support is excellent.
- Trello's Power-Ups add hundreds of increased functionality (i.e., Google Drive/DropBox, Slack, online calendar sync, contact sharing, etc.). Most are free!
- Text-like real-time communication keeps your team up-to-date.
- The phone app enables voice dictation as you walk through your property.
- All checklists can be printed on paper or exported into PDF documents to share with non-Trello users (like your subcontractors and vendors).
- You'll be able to upload photos directly from your phone onto Trello cards.
- Drag and drop options allow quick reorganization of lists, cards, or tasks.
- Color-coded labels provide increased visibility and at-a-glance progress notes.

With over 50 million users, Trello has online security figured out! And as we build your system, we'll exclude addresses, last names, and sensitive details per your suggestions.

For more on Trello Security, please [click](#) here. More questions? [Just ask](#).



REQUIRED TECH KNOWLEDGE AND EQUIPMENT

You'll need:

1. **A computer with Word and Excel** (or Number and Pages) software to update your templates (only entry-level experience is required).
2. **A smartphone** with the Trello app.

Our winning combination?

Our practical experience + Trello + HTMM™ Training + You! It's that simple.

Now you're ready to get started.
Let's dive in!

HERE'S YOUR STEP-BY-STEP GUIDE

1. First Things First

- Watch our **Free Introduction Module** on our HTMM™ website with Trello basic training and vocabulary.
- Create a free **Trello** account and download the phone app. Purchase the **entire HTMM™ system** or select only the module(s) that suit your needs.
- Each training video will walk you through creating Trello boards, lists, cards, checklists, and the most efficient way to collect your household information.
- Then, we'll review the templates, information formatting, and data collecting and upload them into your Trello system.

2. Prepare Yourself

- Schedule uninterrupted time** to focus on your training. Watch our HTMM™ training videos on your phone while you work on your computer.
- Download the to-do list and the HTMM™ templates** and watch our training video.
- Start small and pick only one project to start.** Grab a buddy (two is always better than one!).
- Determine the detail needed for your inventories** (for example, inventory each piece of pottery, or will a group photo do).
- Follow our to-do list** to collect your household information and personal data and check your progress.



HERE'S YOUR STEP-BY-STEP GUIDE (CONTINUED)

3. Organize Your Information

- Use your phone's camera to collect your household information.** PRO TIP: when photographing appliances, take an overview photo of the appliance plus a detailed shot of the serial and model number tag.
- Download phone photos to your computer** (use AirDrop for the fastest image transfer.)
- Rename each image** so it will be searchable within your Trello boards when you upload them to your Trello cards (i.e., rename IMG_1234.JPG to Main House Kitchen Refrigerator).
- When building a system for more than one house, **use image naming protocol** such as Main House Kitchen Refrigerator, Guest Cottage Kitchen Refrigerator, etc.)
- Organize these images in your computer folders** by room (Kitchen, Living Room, First Bedroom, etc.).

4. Start Inputting

- Open our Excel or Word templates**, get familiar with the information and start customizing each.
- Note the Trello Heading column on your spreadsheet** (to the far right). This column includes a formula for creating information that will be copied and pasted into your Trello cards.

5. Know When to Upgrade from Free to Paid Trello

- Each of our training videos starts with all the tasks you'll be able to do with your free Trello account.** Then we'll show you additional functionality with the paid version.
- Your decision to upgrade will depend on your need** for sharing, calendaring, detailing, and updating the information within your system.
- Wait until you know you need to upgrade.** We think that you'll be glad you did!

6. Final Steps

- Invite your staff to create Free Trello accounts** to mark their tasks complete, stay on schedule, and communicate with staff. Upgrade them to a paid account only if needed. The decision to upgrade will become evident once they start using your new system.
- If you have any questions along the way, email us at: hello@howtomanageamansion.com
- We'll email you answers to your questions and provide weekly training videos with Pro Tips.
- Watch the recorded version at your leisure.



THE RESULTS?

- **Save money** by calendaring preventative maintenance needs.
- **Set staff up for success** by refining job descriptions, responsibilities, and expectations.
- **Minimize risk** with staff and contractors with standard operating procedures, safety guidelines, and property protection expectations.
- **Reduce conflicts** by assigning specific tasks to each staff with what, when, and how tasks get completed.
- **Streamline team communication** by eliminating numerous emails, texts, and phone calls to collaborate.
- **Broadcast priority requests** while you and your staff work on your property.
- **Build a household history** for absolutely everything.
- **Onboard new staff** with your preferences, service providers, and property history.

BOOM! That's it.

FROM OWNER KELLY FORE DIXON

I appreciate your interest in Estate Management Systems!

I know the decision to start an online system is a monumental one. In addition to selecting the right system, it takes countless hours to populate it, so we've created a valuable tool for you and your staff.

My best advice is to invest in software that gives you the most functionality and flexibility - that YOU OWN and CONTROL.

Also, let's develop a program that is fun and easy to use and edit. A program that won't intimidate your staff. Because after you've invested the resources to complete your system, you will only reap the benefits of your valuable investment if your team feels comfortable using it.

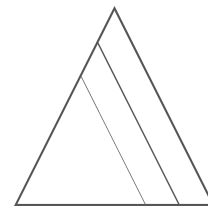
If you have any questions, please reach out!



Kelly Dixon

HERE'S HOW TO REACH US

- **Visit our website:**
www.estatemanagementsystems.com
- **Schedule a free 20-minute live demonstration.**
- **Email us:**
kelly@estatemanagementsystems.com
- **Visit our shop:**
www.estatemanagementsystems.com/shop
- **Subscribe to our email list and YouTube Channel** to receive information about upcoming events and training.



**ESTATE
MANAGEMENT
SYSTEMS**

The ideas and information in this brochure are the property of Estate Management Systems and cannot be copied or distributed by any other party.