

Operating Support Starter Pack

Choose one recurring task and build the help your team needs to do it. This pack contains four editable templates and a connected make-ready example. You can start with one document; a complete set is not required.

Choose where to start

The question people need answered	Start with
Why does this area exist and who owns it?	Domain overview
What happens, who is responsible and when?	SOP
How do I complete this task?	Work instruction
What must I check while doing the work?	Job aid

First check existing guidance. An answer may be buried, outdated, unclear, or written for another role. If the company has not decided the expectation, identify who can decide before writing instructions.

Use the pack

1. Ask a practitioner to show the task, including exceptions and where someone else must decide.
2. Copy the relevant template into a separate Word file. Replace bracketed prompts, add rows or space as needed, and remove template instructions.
3. Link related guidance by its actual title and location. Keep task instructions and job aids directly accessible.
4. Have a teammate try it during the work. Revise what is missing or unclear, confirm the expectation with its owner, and put the current version where the team will use it.

Go to a template or example

[Domain overview](#) | [SOP](#) | [Work instruction](#) | [Job aid](#)

[Open the completed make-ready example directory](#)

The templates are starting structures. The sample make-ready rules, roles, and Turn Board tool are illustrative and are not NorthPoint procedures. Confirm your own standards, permissions, and decision authority.

Domain overview template

Copy this page. Replace the prompts and expand only what the reader needs.

Area of work

[Name the business area this overview describes]

Purpose and outcome

[Why this area exists and what it is responsible for achieving]

Scope and boundaries

[What is included, what is outside this area, and where related work belongs]

Connections to the business

[Which teams or processes provide inputs or depend on this area]

Operating ownership

[Who decides expectations and resolves questions about scope or responsibility]

Guidance ownership

[Who maintains the documents, how users report a mismatch, and what changes should prompt a review]

Related procedures

[List the title and link or location of each relevant SOP]

Document details

[Owner or contact / updated date / draft or approved status]

SOP template

Copy this page. Describe the process and its decisions; link detailed task instructions.

Procedure and outcome

[Name the procedure and the result it should produce]

Where it fits and when it begins

[Related domain / preceding work / trigger / conditions that must be true before starting]

Process owner and participating roles

[Who owns the process and which roles take part]

Flowchart of the phases

[Insert a flowchart showing the phases in order, role handoffs, decision points, and paths for correction or exceptions]

Milestones and responsibilities

Add or remove rows. Name the evidence or condition that allows work to move on.

Milestone	Responsible role	Ready to move on when
[Starting milestone]	[Role]	[Condition or evidence]
[Next milestone]	[Role]	[Condition or evidence]
[Completion milestone]	[Role]	[Condition or evidence]

Stops and decisions

[What should stop or return for correction, who resolves it, and who needs an update]

Procedure complete

[Required outcome and how someone can verify it]

Connected guidance and document details

[Domain, work instruction and job aid titles with links / owner or contact / updated date / status]

Work instruction template

Copy this page. One role, tool, and outcome are a useful default; split at meaningful handoffs.

Task and outcome

[Name the task and the result the user will produce]

Role and tool

[Who performs this task and where they do it]

Before starting

[Trigger, permissions, information, materials, and decisions needed]

Task steps

Pair the steps with screenshots from your tool. Crop and highlight the relevant fields or controls; show the expected result. Keep the written actions clear and update screenshots when the tool changes.

Step	Action	Expected result or check
1	[Action and matching screenshot]	[Visible result]
2	[Action and matching screenshot]	[Visible result]
3	[Action and matching screenshot]	[Visible result]

If something goes wrong

[Specific condition / stop or recovery action / person who can resolve the question]

Done with this task

[What to verify in the saved result and any next person or action]

Connected guidance and document details

[Parent SOP and job aid titles with links / owner or contact / updated date / status]

Job aid template

Copy this page. Keep only the reminders needed at the moment of action.

Job aid title

[Name the check, reference, or moment this supports]

For whom and when

[Role / the point in the task when this is useful]

Checks at the point of use

[] [Observable condition to check]

[] [Observable condition to check]

[] [Observable condition to check]

[] [Saved result to verify, if applicable]

If a check fails

[What to stop, correct, or ask, and who can resolve it]

Need the full steps or the reason

[Work instruction title and link / SOP or standard title and link]

Document details

[Owner or contact / updated date / draft or approved status]

If the task needs a short reference or worked example rather than a checklist, replace the checks with that format.

Make ready example directory

Follow one vacant home from assessment through authorized release. These documents demonstrate different kinds of support for the same work. They are newly authored examples, not NorthPoint procedures.

The process at a glance

Scope > Approve > Complete > Pressure test > Release

If the pressure test fails, correct the work and retest. Completed work orders do not establish readiness; the example property manager verifies and records release.

Open a document

[Domain overview: Maintenance](#)

[SOP: Unit make-ready once vacant](#)

[Work instruction: Record a make-ready scope in Turn Board](#)

[Work instruction: Pressure test](#)

[Job aid: Scope creation checklist](#)

[Job aid: Pressure-test checklist](#)

Follow the connections

Maintenance -> Unit make-ready once vacant -> two selected tasks: record the scope and pressure test. Each task has a job aid. The two instructions expand selected tasks; they are not an exhaustive set of technical repair instructions.

Adapt before use

Replace the fictional tool and sample roles with your own. Confirm readiness standards, entry permissions, approvals, required inspections, exception owners, and how release is communicated. Do not treat example statuses or dates as company policy.

When the work changes

Tool steps change: check instructions and their job aids. Responsibility or milestones change: revisit the SOP and affected task support. Purpose or scope changes: revisit the domain overview and its connected guidance.

Framework attribution: Steven Rea, Four layers of operating support, developed from Year One Episode 7 recording discussions. The method is early operating guidance and does not establish measured results. Written support works alongside practice, coaching, and judgment.

[Return to the starting guide](#)

Maintenance

Keep homes and property systems in working condition through maintenance, repairs, and vacant-unit make-ready.

Area owner: Property operations manager

Guidance owner: Operations support lead

Teaching example only. Adapt the operating expectations to your company before use.

Purpose

Maintenance supports the condition and function of homes throughout occupancy and vacancy. It connects assessment, planned maintenance, repairs, and verification of completed work. Unit make-ready once vacant is one procedure within this domain.

A target ready date helps people plan. Only a verified, authorized release establishes Ready in this example.

Scope and boundaries

- Includes preventive maintenance, corrective repairs, condition assessment, and vacant-unit make-ready.
- Connects maintenance staff and vendors with property operations, residents, and leasing. Each procedure defines its own trigger, roles, and completion criteria.
- For unit make-ready once vacant, possession and permission to enter must be confirmed. Entry, spending authority, technical repair methods, and required inspections follow their applicable company standards; this sample does not define those standards.

Who maintains this area

The property operations manager owns maintenance expectations and resolves unclear responsibilities. The operations support lead maintains this guidance with the people who plan, perform, and check maintenance work. For vacant-unit make-ready, the property manager owns the release decision.

Report an unclear or outdated instruction to the support lead. Take an unresolved readiness decision to the property operations manager; keep the home unreleased while it is unresolved.

A procedure within this area

Unit make-ready once vacant connects the whole turn within maintenance. The linked work instructions expand two tasks: recording the initial scope and pressure testing the home before release.

[Open SOP: Unit make-ready once vacant](#)

[Return to the example directory](#)

Unit make ready once vacant

Coordinate the work, resolve exceptions, and release the home only after its readiness has been verified.

Process owner: Property operations manager

Roles: Coordinator, trades, property manager, leasing

Begins: Unit vacant; possession and access confirmed

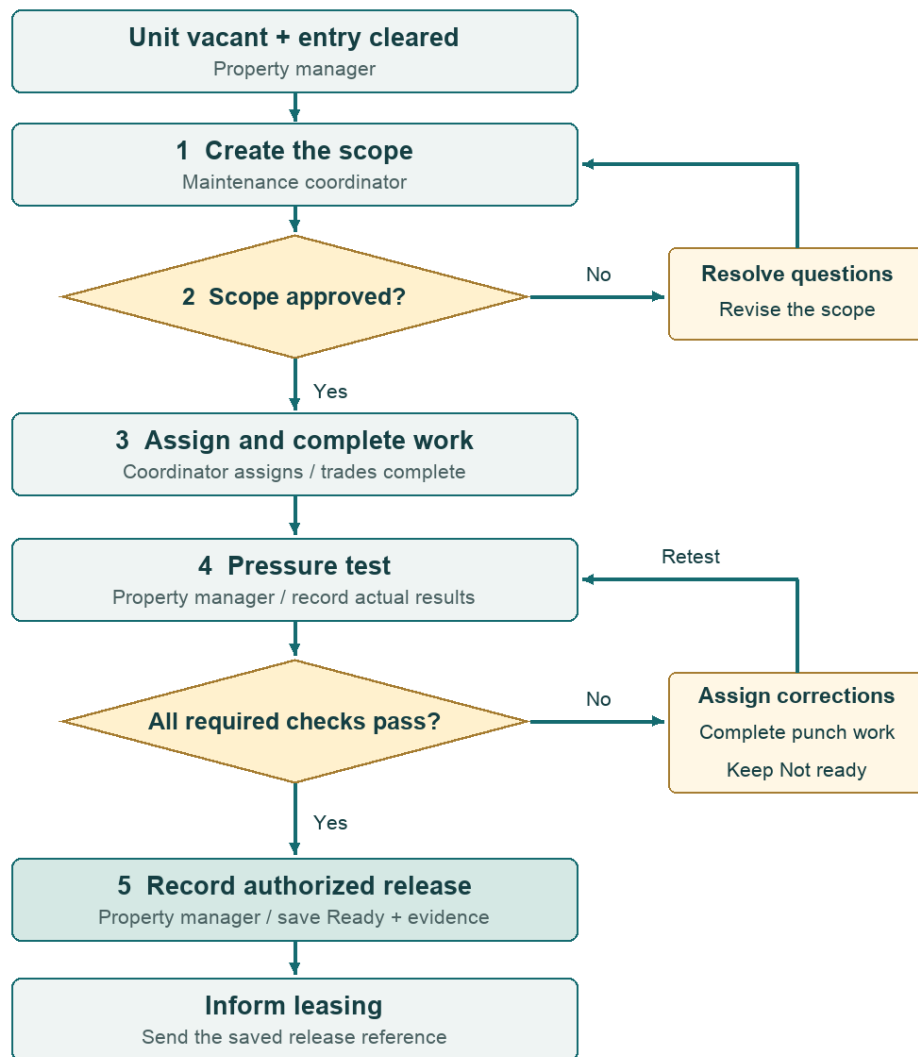
Ends: Verified release recorded; leasing informed

Teaching example only. Adapt the operating expectations to your company before use.

Process flowchart

UNIT MAKE-READY ONCE VACANT

Illustrative SOP / phases, decisions and correction paths



One process with two decision points. Approval and a passed pressure test are required before release.

Before the scope walk

The property manager confirms the unit is vacant, possession is established, and entry is permitted under the applicable company rules. The maintenance coordinator opens the home's turn record with its target ready date and current condition marked Not ready. The target is a planning date, not a release.

The readiness rule

Completed work orders do not make the home Ready. The property manager must verify the approved scope and applicable readiness standard, resolve required punch items, and record the authorized release. Until then, the home stays Not ready.

The coordinator owns follow-up on unfinished work. The property manager owns the release decision. Leasing uses the saved release status when communicating readiness.

Milestones and responsibilities

1 Assess the home and record the scope

Responsible: Maintenance coordinator

Walk the home after entry is cleared. Record each finding, proposed work, evidence, and missing decision. Submit the scope for review.

[Open the scope work instruction](#)

2 Approve the scope and assign the plan

Responsible: Property manager + maintenance coordinator

The property manager confirms approval within the applicable spending authority or obtains the required authorization. The coordinator assigns each approved item to a trade or vendor, records its target completion, and sequences repairs, cleaning, and inspection. Share the current target ready date with leasing.

3 Complete and document the work

Responsible: Assigned trades or vendors; coordinator follows up

Each assigned person completes approved work and records the result and required evidence. The coordinator checks remaining items and dependencies. New findings return for scope review; delays trigger a revised plan and an update to the property manager and leasing.

4 Pressure test and resolve the punch list

Responsible: Property manager; coordinator assigns corrections

After required work and cleaning are recorded complete, pressure test the home against the approved scope and readiness standard. Record failed checks as punch items with an owner and target date. Reinspect corrections before release.

[Open the pressure-test work instruction](#)

5 Authorize release and inform leasing

Responsible: Property manager

When all required checks pass, save the release with the inspection evidence, decision owner, and date. Verify the saved Ready status, then tell leasing which home has been released and link the record.

[Use the pressure-test checklist](#)

When the process stops or changes

- Entry or possession unclear: stop the scope walk and return the issue to the property manager.
- Unapproved work or a new finding: the coordinator records it and seeks the required approval before that work proceeds.
- A missed target or failed final check: keep Not ready, assign the remaining work, and update the target and leasing's expectations.
- Readiness standard unclear: the property operations manager resolves the expectation. A target date or move-in commitment does not waive a required check.

[See the failed pressure-test steps](#)

Procedure complete

The saved record contains the approved scope, work completion evidence, passed pressure test, resolved required punch items, and the property manager's release. Leasing has received the release reference.

[Why the release matters: Maintenance](#)

[Return to the example directory](#)

Record a make ready scope in Turn Board

Capture the home's condition and proposed work clearly enough for the property manager to review.

Role: Maintenance coordinator

Tool: Turn Board - fictional example

Start condition: Possession and entry cleared

Outcome: Scope saved and submitted for review

Teaching example only. Adapt the operating expectations to your company before use.

Have these ready

- The correct home's turn record and confirmed entry permission.
- The current company readiness standard and applicable inspection requirements.
- Access to capture location-specific findings and supporting photos.

[Keep the scope creation checklist beside you](#)

Steps in the example tool

1. Open the home's turn record.

Match the property and home identifier. Confirm Not ready and the target ready date. If entry is not cleared, stop and contact the property manager.

TURN BOARD

MOCK SCREEN / FICTIONAL TOOL

Overview

Scope

Pressure test

Release

Confirm the turn record

Example home 12 / MR-104

Home

Example home 12 / MR-104

Entry permission

Cleared by property manager

Readiness

Not ready

Target ready date

Example day 5 / planning only

Open scope

Match the home identifier. Entry must be cleared.

Step 1 · Match the home and confirm entry before starting.

2. Walk and record by location.

In Scope, add each finding with its room or location, observed condition, proposed work, and supporting photo or note. Use the readiness standard and scope creation checklist to cover the home.

TURN BOARD		MOCK SCREEN / FICTIONAL TOOL
Overview	Add a finding Example home 12 / MR-104	
Scope	Location	Kitchen
Pressure test	Observed condition	Cabinet door binds
Release	Proposed work	Adjust hinge; verify operation
	Evidence	cabinet-door.jpg attached
Save finding		
Describe what you observed; attach the evidence.		

Step 2 · Record a specific condition and proposed work.

3. Separate a finding from an approval.

For example: Kitchen · cabinet door binds · adjust hinge and verify operation. Mark the item Awaiting approval. Record any estimate or specialist assessment needed for a decision; do not treat proposed work as authorized.

TURN BOARD		MOCK SCREEN / FICTIONAL TOOL
Overview	Keep proposed work separate Example home 12 / MR-104	
Scope	Finding	Kitchen cabinet door binds
Pressure test	Item approval	Awaiting approval
Release	Estimate / assessment	Estimate requested
	Authorization	Not recorded
Save item		
Keep Awaiting approval until authority is recorded.		

Step 3 · A saved finding is not authorization to do the work.

4. Identify sequence and open questions.

Note dependencies such as completing repairs before final cleaning. Record missing information and the decision needed. Leave areas you could not assess visibly unresolved.

TURN BOARD		MOCK SCREEN / FICTIONAL TOOL
Overview	Record dependencies and gaps	
	Example home 12 / MR-104	
Scope	Sequence	Repairs before final cleaning
Pressure test	Open decision	Approve cabinet-door estimate
Release	Unassessed area	Locked storage / access needed
	Follow-up owner	Maintenance coordinator
Save open questions		
An unassessed area stays visible until reviewed.		

Step 4 · Make dependencies and unanswered questions visible.

5. Submit the scope for review.

Choose Submit scope. Select the property manager as reviewer and save. Read back the findings, evidence, open questions, and Scope awaiting review status.

TURN BOARD		MOCK SCREEN / FICTIONAL TOOL
Overview	Scope submitted	
	Example home 12 / MR-104	
Scope	Reviewer	Property manager
Pressure test	Scope status	Awaiting review
Release	Open questions	Estimate + storage access
	Readiness	Not ready
Submitted		
Submission requests review; it does not release the home.		

Step 5 · After Submit scope, read back the saved status and reviewer.

[What happens after review? See the SOP milestones](#)

Done with this task

The saved scope is available to the named property manager for review. The coordinator follows up on open questions. Approval, assignment, and execution are later SOP milestones; the home remains Not ready.

Turn Board Illustrative scope record

Field	Example value
Home	Example home 12 · MR-104
Readiness	Not ready
Scope status	Awaiting review
Finding	Kitchen cabinet door binds
Proposed work	Adjust hinge; verify operation
Item approval	Awaiting approval
Reviewer	Property manager

If the scope cannot be completed

Record the inaccessible area, missing assessment, or tool failure. Tell the property manager what prevents review. Keep the scope incomplete until the missing information is resolved; a blank field is not evidence that no work is needed.

[Return to the example directory](#)

Pressure test

Pressure test the completed make-ready: check that the home and finished work function as intended and meet the readiness standard before recording Ready.

Role: Property manager

Tool: Turn Board - fictional example

Start condition: Required work and cleaning recorded complete

Outcome: Release recorded, or punch work assigned

Teaching example only. Adapt the operating expectations to your company before use.

Before the pressure test

Open the correct home's record. Have the approved scope, work evidence, current readiness standard, and required inspection records available. If required work is still open, return it to the coordinator before attempting release.

[Open the pressure-test checklist](#)

Steps in the example tool

1. Review the completed work.

In Pressure test, compare recorded completion with the approved scope. Confirm required inspection records are present. A completed task status alone is insufficient evidence of readiness.

TURN BOARD		MOCK SCREEN / FICTIONAL TOOL
Overview	Review completed work Example home 12 / MR-104	
Scope	Scope	Approved / MR-104
Pressure test	Work + cleaning	Recorded complete
	Required inspection records	Linked to turn record
Release	Readiness	Not ready / pressure test pending
	Start pressure test	
	Recorded completion still needs an in-home check.	

Step 1 · Check the approved scope and completion evidence.

2. Pressure test the home.

Walk the home against the company readiness standard. Verify the finished work, cleaning, and required checks. For the cabinet-door item, confirm it operates as intended. Record each check's result and evidence; use the exception path for any failure or unverified item.

TURN BOARD		MOCK SCREEN / FICTIONAL TOOL
Overview	Record the actual check result	
	Example home 12 / MR-104	
Scope	Check	Kitchen cabinet-door operation
Pressure test	Result	FAIL / door still binds
	Correction	Adjust hinge; coordinator assigns
Release	Readiness	Not ready / retest required
	Save punch item	
	Record failure and evidence; correct, then retest.	

Step 2 · A failed check becomes a punch item, then a retest.

3. Confirm the release conditions.

Confirm all required checks pass, required punch items are resolved and reinspected, and keys/access arrangements are ready under the applicable standard.

TURN BOARD		MOCK SCREEN / FICTIONAL TOOL
Overview	Confirm release conditions	
	Example home 12 / MR-104	
Scope	Cabinet door / retest	PASS / operates as intended
Pressure test	Required checks	All passed / evidence linked
	Required punch items	None open
Release	Keys + access	Ready / standard met
	Review release	
	Checks passed. Authorized release is the next step.	

Step 3 · After correction and retest, confirm every release condition.

[Use the pressure-test checklist](#)

4. Record the authorized release.

Choose Release home. Save Ready with the passed inspection, your identity as release owner, and the release date. Read back the saved status and evidence before communicating release.

TURN BOARD		MOCK SCREEN / FICTIONAL TOOL
Overview	Authorized release saved Example home 12 / MR-104	
Scope	Readiness Ready	
Pressure test	Pressure test Passed / evidence linked	
Release	Release owner Property manager	
	Release date Example day 5	
	Release saved	
	Read back the saved record before telling leasing.	

Step 4 · After Release home, verify the saved release and evidence.

[Read the SOP readiness rule](#)

5. Inform leasing.

Send leasing the home identifier and saved release reference. Record that notification in the turn record. If the notification fails, resolve it before treating the overall procedure as complete.

TURN BOARD		MOCK SCREEN / FICTIONAL TOOL
Overview	Leasing notification recorded Example home 12 / MR-104	
Scope	Recipient Leasing team	
Pressure test	Home Example home 12	
Release	Release reference MR-104 / saved release	
	Notification Sent / Example day 5	
	Notification recorded	
	If sending fails, resolve it before closing the procedure.	

Step 5 · Confirm leasing received the saved release reference.

If a pressure test check fails

Keep Not ready. In Punch list, record the location, failed condition, evidence, and correction needed. Send it to the coordinator for assignment and a target completion date; verify those are recorded. Update leasing on the pending release and revised target. After correction, retest the item and any affected checks, then repeat the pressure-test checklist.

If the standard itself is unclear, ask the property operations manager for a decision. If the tool cannot save the inspection or release, keep the release pending and resolve the recording problem before telling leasing the home is Ready.

[See the SOP exception owners](#)

Done with this task

Either the saved release is verified and leasing has been informed, or the home remains Not ready with specific punch work assigned and its next pressure test pending. A failed pressure test never becomes Ready just because the target date arrived.

Turn Board Illustrative record after correction and reinspection

Field	Example value
Home	Example home 12 · MR-104
Scope and work	Approved; required work complete
Pressure test	Passed; evidence linked
Cabinet-door check	Operation verified after adjustment
Required punch items	None open
Readiness	Ready
Release owner / date	Property manager · Example day 5
Leasing notification	Release reference sent · Example day 5

[Return to the example directory](#)

Scope creation checklist

Use alongside the company readiness standard to capture reviewable findings.

For: Maintenance coordinator

Use when: Walking the home to build the scope

Teaching example only. Adapt the operating expectations to your company before use.

Capture before submitting

- ☐ Correct home; possession and entry permission confirmed.
- ☐ Each room and applicable exterior area reviewed against the readiness standard.
- ☐ Surfaces, doors, cabinets, fixtures, appliances, and cleaning needs captured as applicable.
- ☐ Each finding names a location, observed condition, proposed work, and supporting evidence.
- ☐ Required specialist assessments, access issues, and unassessed areas are visible.
- ☐ Dependencies and approval questions are recorded; proposed work is not marked approved.
- ☐ Saved scope shows the property manager as reviewer; home remains Not ready.

If a check cannot be completed

Record the gap and tell the property manager what is needed. Follow applicable safety and entry procedures for hazards or access restrictions. Do not represent an unassessed area as checked.

Need the steps or the next milestone

[Show the steps: Record a make-ready scope](#)

[See approval and assignment in the SOP](#)

[Return to the example directory](#)

Pressure test checklist

Keep this beside the pressure test and release record.

For: Property manager

Use when: Deciding whether to release the home

Teaching example only. Adapt the operating expectations to your company before use.

Before choosing Release home

- ☐ Correct home and approved scope reviewed.
- ☐ Required work and cleaning verified in the home.
- ☐ Applicable readiness checks passed; required inspection records available.
- ☐ Required punch items corrected and reinspected; no unresolved release blockers.
- ☐ Keys and access arrangements meet the applicable readiness standard.

After saving the release

- ☐ Saved record shows Ready, inspection evidence, release owner, and release date.
- ☐ Leasing has received the home identifier and saved release reference; notification is recorded.

A check fails or remains unverified

Keep Not ready. Record the specific punch item or missing decision, route it to its owner, and update leasing. Reinspect corrections before release. A planned ready date does not override the checks.

[Show the failed pressure-test steps](#)

Need the steps or the reason

[Open the pressure-test work instruction](#)

[Read the SOP readiness rule](#)

[Return to the example directory](#)