10 Questions to Ask When Interviewing a Managing Agent

Hiring a managing agent (MA) is a bit like hiring for a job. You wouldn't pick a candidate without asking questions and comparing answers, and the same goes for your MA. Price and past work usually carry the most weight, so they are on the list. But many councils stop there and choose after a short chat, then find out the gaps later.

Council members are volunteers. Most of you have a day job, and few have ever interviewed an MA. Without a way to compare, the decision tends to come down to feel: who was friendlier, who spoke more confidently, who the last council used. A score gives you a more objective way to evaluate each prospect. It also gives the council something to point to when the members disagree.

A score also helps when owners ask why you picked a particular MA. Some will question the choice, and "we felt they were the best" is a hard answer to defend. If you can show the questions you asked and the scores each MA got, you can tell subsidiary proprietors (SPs) that the decision was objective and not based on personal preference. Even owners who disagree can see how the council reached it.

We've put together 10 questions you can ask each shortlisted MA. Rate each answer out of 10 and add up the score. Maximum is 100. There's a checklist on the last page you can print and bring to the meeting.

The questions

1. Which similar estates do you manage, and can we speak to two of their council members? Which estates left you in the last 2 years, and why?
2. What is your total fee, what does it cover, and what costs extra (for example AGM, EGM or extra site visits)?
3. How do you track maintenance work and follow up on requests? What can the council see, and what is your usual turnaround?
4. How do you check that completed work meets the spec, and who signs it off?
5. What would you do differently from our previous MA? Please give an example.
6. How do you plan long-term works, such as repainting or lift upgrades, and advise on the sinking fund?
7. How do you handle an SP's request or complaint from start to close? Who replies, and when?
8. Who will be our building manager, and who covers when they are away? How do you evaluate them, and what if they underperform?
9. How do you choose and evaluate vendors? Do you have any commercial relationship with them, and what if one underperforms?
10. How and how often do you report to the council, and how do we get our records if we change MA?

How to score

Give 0 to 3 for a vague or generic answer, 4 to 6 for a reasonable answer with no example, and 7 to 10 for a clear process backed by a real example or evidence. If the MA can only say "we take it seriously", that's a 3.

Have every council member at the meeting score separately, then compare. If two members score the same answer very differently, that's worth a short discussion before you decide. The total won't make the decision for you, but it will show you where the MAs really differ.

Managing Agent Interview Checklist

Estate / MCST: _____ **Date:** _____

Managing agent: _____ **Scored by:** _____

#	Question	Score (0-10)	Notes
1	Which similar estates do you manage, and can we speak to two of their council members? Which estates left you in the last 2 years, and why?		
2	What is your total fee, what does it cover, and what costs extra (for example AGM, EGM or extra site visits)?		
3	How do you track maintenance work and follow up on requests? What can the council see, and what is your usual turnaround?		
4	How do you check that completed work meets the spec, and who signs it off?		
5	What would you do differently from our previous MA? Please give an example.		
6	How do you plan long-term works, such as repainting or lift upgrades, and advise on the sinking fund?		
7	How do you handle an SP's request or complaint from start to close? Who replies, and when?		
8	Who will be our building manager, and who covers when they are away? How do you evaluate them, and what if they underperform?		
9	How do you choose and evaluate vendors? Do you have any commercial relationship with them, and what if one underperforms?		
10	How and how often do you report to the council, and how do we get our records if we change MA?		
	TOTAL	**/ 100**	

Scoring guide: 0-3 vague or generic answer. 4-6 reasonable answer, no example. 7-10 clear process backed by a real example or evidence.