



Dynasty Worldwide's Integration Plan

A structured, step-by-step process for transitioning a building from its current management provider into Dynasty's modern, disciplined, high-performance management system. It is a precision-engineered onboarding framework designed to ensure a smooth, organized, transparent, and disruption-free transition for owners, boards, residents, and staff.

In an industry where transitions are often chaotic, rushed, or poorly coordinated, Dynasty's Integration Plan stands out as a professional, methodical, and leadership-driven process that sets the tone for the entire management relationship.

The goal is simple:

Seamless transition. Zero confusion. Zero downtime. Zero disruption.

1. What the Integration Plan Actually Is

The Integration Plan is a comprehensive, multi-phase onboarding system that covers:

- **Document transfer**
- **Financial handover**
- **Compliance review**
- **Vendor alignment**
- **Staff onboarding**
- **Technology setup**
- **Resident communication**
- **Operational restructuring**
- **Building assessment**
- **Risk identification**

It is the blueprint that ensures Dynasty takes full control of the building with clarity, accuracy, and confidence.

2. Why the Integration Plan Matters

A management transition is one of the most sensitive moments in a building's lifecycle. Without a structured plan, buildings face:

- **Lost documents**
- **Missed deadlines**
- **Compliance gaps**
- **Vendor confusion**
- **Resident frustration**
- **Financial inaccuracies**
- **Operational downtime**

Dynasty's Integration Plan eliminates these risks by providing a clear, organized, and proactive roadmap for every step of the transition.

This is where Dynasty's professionalism becomes immediately visible.

3. The Core Phases of the Dynasty Integration Plan

Below is the full breakdown of the Integration Plan and why each phase matters.

Phase 1-Pre-Transition Preparation

Before the official start date, Dynasty:

- **Reviews the management agreement**
- **Establishes communication channels**
- **Assigns the dedicated management team**
- **Prepares onboarding documents**
- **Schedules the transition timeline**
- **Coordinates with the outgoing manager**

Why It Matters

Preparation ensures the transition begins with clarity, structure, and leadership.

Phase 2- Document & Data Transfer

Dynasty collects and organizes all essential building information, including:

- **Financial records**
- **Bank accounts**
- **404&**
- **Vendor contracts**

- **Compliance documents**
- **Maintenance logs**
- **Insurance certificates**
- **Resident lists**
- **Building plans and manuals**

Why It Matters

Accurate data is the foundation of effective management. Dynasty ensures nothing is lost, overlooked, or delayed.

Phase 3- Financial Handover

Dynasty establishes full financial control by:

- **Opening new operating and reserve accounts**
- **Reviewing budgets and expenses**
- **Auditing outstanding invoices**
- **Verifying balances and reserves**
- **Setting up financial reporting systems**

Why It Matters

Financial accuracy builds trust and ensures a clean, transparent start.

Phase 4-Compliance Review & Risk Assessment

Dynasty conducts a full compliance audit, including:

- **Local Law requirements**
- **Open violations**
- **Inspection schedules**
- **Permit renewals**
- **Safety documentation**
- **Insurance coverage**

Why It Matters

This phase identifies risks early and ensures the building becomes fully compliant and protected.

Phase 5- Vendor Alignment & Contract Review

Dynasty:

- **Reviews all vendor contracts**
- **Confirms service schedules**
- **Evaluates performance**
- **Negotiates improved terms if needed**
- **Ensures continuity of essential services**

Why It Matters

Vendors must be aligned with Dynasty's standards of professionalism, accountability, and performance.

Phase 6 - Staff Onboarding & Training

For buildings with on-site staff, Dynasty:

- **Conducts staff interviews**
- **Reviews roles and responsibilities**
- **Provides training on Dynasty systems**
- **Establishes performance expectations**
- **Integrates staff into the Dynasty workflow**

Why It Matters

Staff become part of a structured, high-performance operational system.

Phase 7 - Technology Setup

Dynasty activates:

- **The Resident App**
- **The Board Portal**
- **Digital communication channels**
- **Automated compliance reminders**
- **Maintenance tracking systems**

Why It Matters

Technology creates transparency, efficiency, and a modern resident experience.

Phase 8-Resident Communication Rollout

Dynasty introduces itself to residents through:

- **Welcome letters**
- **App setup instructions**
- **Contact information**
- **Building updates**
- **Clear communication expectations**

Why It Matters

Residents feel informed, supported, and confident from day one.

Phase 9 - Operational Restructuring

Dynasty implements:

- **Preventive maintenance schedules**
- **Emergency protocols**

- **Cleaning standards**
- **Building inspections**
- **Vendor performance tracking**
- **Communication workflows**

Why It Matters

This phase transforms the building into a well-run, organized, predictable environment.

Phase 10-30-Day, 60-Day, and 90-Day Review

Dynasty conducts milestone reviews to ensure:

- **All systems are functioning**
- **Residents are satisfied**
- **Financials are accurate**
- **Compliance is on track**
- **Vendors are performing**
- **Risks are resolved**

Why It Matters

These checkpoints ensure the building is fully integrated into the Dynasty management ecosystem.