

Part I: Market Survey - Telephone and Leasing Evaluation

Apartment Community: _____

Telephone Leasing Professional: _____ Phone Date: _____

Phone Time: _____

Onsite Leasing Professional: _____ Onsite Date: _____

Onsite Time: _____

Shopper Profile

Name Used On Telephone: _____ Number of Occupants: _____

Name Used Onsite: _____ Size Apt. Requested: _____

Date Needed: _____

Section One - Telephone Procedures

	Yes	No
1. Did the Leasing Professional answer the telephone promptly and identify the community by name?	<input type="checkbox"/>	<input type="checkbox"/>
2. Did the Leasing Professional convey a pleasant and friendly tone?	<input type="checkbox"/>	<input type="checkbox"/>
3. Did the Leasing Professional introduce her/himself?	<input type="checkbox"/>	<input type="checkbox"/>
4. Did the Leasing Professional request your name?	<input type="checkbox"/>	<input type="checkbox"/>
5. Was your name used effectively during the conversation?	<input type="checkbox"/>	<input type="checkbox"/>
6. Did the Leasing Professional pre-qualify you by inquiring:		
Apartment size required?	<input type="checkbox"/>	<input type="checkbox"/>
Date apartment needed?	<input type="checkbox"/>	<input type="checkbox"/>
How many would occupy the apartment?	<input type="checkbox"/>	<input type="checkbox"/>
If you had a pet?	<input type="checkbox"/>	<input type="checkbox"/>
Price Range?	<input type="checkbox"/>	<input type="checkbox"/>
Special needs (i.e. F/P, Washer/Dryer, Up/Downstairs, other)?	<input type="checkbox"/>	<input type="checkbox"/>
7. Did the Leasing Professional avoid asking if children would be occupying the apartment?	<input type="checkbox"/>	<input type="checkbox"/>



	Yes	No
8. Were you asked how you knew about the community?	<input type="checkbox"/>	<input type="checkbox"/>
9. Did the Leasing Professional ask why you were moving?	<input type="checkbox"/>	<input type="checkbox"/>
10. Did the Leasing Professional make the apartment sound desirable and/or did the Leasing Professional paint a word picture?	<input type="checkbox"/>	<input type="checkbox"/>
11. Did the Leasing Professional seem focused and interested in assisting you with your needs?	<input type="checkbox"/>	<input type="checkbox"/>
12. Did the Leasing Professional discuss community amenities?	<input type="checkbox"/>	<input type="checkbox"/>
13. Did the Leasing Professional attempt to schedule an appointment?	<input type="checkbox"/>	<input type="checkbox"/>
14. Did the Leasing Professional offer directions to the community?	<input type="checkbox"/>	<input type="checkbox"/>
15. Did the Leasing Professional ask for your telephone number? Did the Leasing Professional ask for additional contact information? Mailing Address <input type="checkbox"/> Email Address <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Did the Leasing Professional discuss deposits and lease rates with confidence?	<input type="checkbox"/>	<input type="checkbox"/>
17. Did the Leasing Professional remain in control and guide the conversation (and not merely respond to questions)?	<input type="checkbox"/>	<input type="checkbox"/>
18. Did the Leasing Professional create a sense of urgency?	<input type="checkbox"/>	<input type="checkbox"/>
19. Was the overall telephone presentation positive?	<input type="checkbox"/>	<input type="checkbox"/>

Telephone Comments:



Section Two - Community Appearance

Yes **No**

- | | | |
|--|--------------------------|--------------------------|
| 20. Did you easily locate the community? | <input type="checkbox"/> | <input type="checkbox"/> |
| 21. Did you easily locate the community center/office? | <input type="checkbox"/> | <input type="checkbox"/> |
| 22. Was your first impression of the community positive? | <input type="checkbox"/> | <input type="checkbox"/> |
| 23. Were the main community signs clearly visible, upright, and well maintained? | <input type="checkbox"/> | <input type="checkbox"/> |
| 24. Was there convenient parking for prospective residents? | <input type="checkbox"/> | <input type="checkbox"/> |
| 25. Were the grounds clean? | <input type="checkbox"/> | <input type="checkbox"/> |
| 26. Were the lawns and landscaping neat? | <input type="checkbox"/> | <input type="checkbox"/> |
| 27. Was the parking lot in good condition? | <input type="checkbox"/> | <input type="checkbox"/> |
| 28. Was the entryway into the information center clean and attractive? | <input type="checkbox"/> | <input type="checkbox"/> |
| 29. Were walkways or common areas clean and free from personal property? | <input type="checkbox"/> | <input type="checkbox"/> |

Community Appearance Comments:



Section Three - Meeting and Greeting

Yes No

- | | | |
|--|--------------------------|--------------------------|
| 30. Did the office smell fresh, clean and inviting? | <input type="checkbox"/> | <input type="checkbox"/> |
| 31. Did the Leasing Professional stand when you entered? | <input type="checkbox"/> | <input type="checkbox"/> |
| 32. Did the Leasing Professional greet you with a smile? | <input type="checkbox"/> | <input type="checkbox"/> |
| 33. Did the Leasing Professional introduce her/himself? | <input type="checkbox"/> | <input type="checkbox"/> |
| 34. Did the Leasing Professional shake your hand when he/she introduced him/herself? | <input type="checkbox"/> | <input type="checkbox"/> |
| 35. Did the Leasing Professional offer you a seat? | <input type="checkbox"/> | <input type="checkbox"/> |
| 36. Was the Leasing Professional's desk clean and uncluttered? | <input type="checkbox"/> | <input type="checkbox"/> |
| 37. Was the Leasing Professional dressed professionally? | <input type="checkbox"/> | <input type="checkbox"/> |
| 38. Did the Leasing Professional remember your telephone call? | <input type="checkbox"/> | <input type="checkbox"/> |
| 39. Did the Leasing Professional seem aware of the apartments available? | <input type="checkbox"/> | <input type="checkbox"/> |
| 40. Did the Leasing Professional make you feel welcome? | <input type="checkbox"/> | <input type="checkbox"/> |
| 41. Was the office clean, neat, professional and inviting? | <input type="checkbox"/> | <input type="checkbox"/> |
| 42. Were you offered refreshments? | <input type="checkbox"/> | <input type="checkbox"/> |
| 43. Did the Leasing Professional seem sincerely interested in helping you? | <input type="checkbox"/> | <input type="checkbox"/> |

Greeting Comments:



Section Four - Information Gathering

Yes **No**

44. Was a guest card completed manually or electronically (i.e. information entered on a computer):

By Shopper

By a Leasing Professional

45. Did the Leasing Professional determine any of the following?

Apartment size

Price range or budget

Move-in date

Number of occupants

Pets

Where you live now or mailing address

E-mail address

Telephone (home, work, cell)

Any specific needs/preferences

46. Did the Leasing Professional determine how you knew the community?

47. Did the Leasing Professional ask why you were moving?

48. Did the Leasing Professional create rapport while attempting to determine your needs?

49. Did the Leasing Professional use the company Web site, floor plans and/or a brochure to sell the apartment and/or community?

50. Did the Leasing Professional request proper identification prior to taking you to the apartment and/or community?

Information Gathering Comments:

Section Five - Leasing Demonstration

Yes **No**

51. Did the Leasing Professional seem eager to show you an apartment model?

52. Did the Leasing Professional take control and lead with enthusiasm?

53. Did the Leasing Professional take a scenic yet convenient route to the apartment?

54. Did the Leasing Professional initiate and carry on a friendly conversation as you walked to and from the apartment? Please explain.

55. Did the Leasing Professional sell the management and maintenance on the way to the apartment/model?

56. Did the Leasing Professional discuss and/or point out the amenities and facilities of the community? Please explain.

57. Did the Leasing Professional discuss neighborhood attractions (i.e. shopping, restaurants, entertainment) or neighborhood conveniences?

58. Did the Leasing Professional show any of the following? (check all that apply)

 Model

 Vacant

 Occupied

59. Did the Leasing Professional show an apartment that was clean, made ready, and comfortable in temperature? Please explain.



The Market Survey Presentation

Participant Guide

National Apartment Leasing Professional

- | | Yes | No |
|--|--------------------------|--------------------------|
| 60. Did the Leasing Professional mention benefits for the apartment features s/he demonstrated? Please explain. | <input type="checkbox"/> | <input type="checkbox"/> |
| <hr/> | | |
| 61. Did the Leasing Professional encourage you to be actively involved in the apartment demonstration (i.e., open doors, drawers, etc.)? | <input type="checkbox"/> | <input type="checkbox"/> |
| 62. Did the Leasing Professional exhibit complete knowledge of the apartment demonstrated? | <input type="checkbox"/> | <input type="checkbox"/> |
| 63. Did the Leasing Professional point out advantages you said were important? | <input type="checkbox"/> | <input type="checkbox"/> |
| 64. Did the Leasing Professional effectively overcome your objections? What objection did you offer? | <input type="checkbox"/> | <input type="checkbox"/> |
| <hr/> | | |
| 65. Did the Leasing Professional attempt to close the sale while still in the apartment/model? Please explain. | <input type="checkbox"/> | <input type="checkbox"/> |
| <hr/> | | |
| 66. Did the Leasing Professional refrain from discussing what type of people lived within the community? Please explain. | <input type="checkbox"/> | <input type="checkbox"/> |
| <hr/> | | |
| 67. Did the Leasing Professional dutifully refrain from using the word "security" or imply in any fashion that the community was a safe place to live? Please explain. | <input type="checkbox"/> | <input type="checkbox"/> |

Demonstrating Comments:



Section Six - Closing Techniques

	Yes	No
68. Did the Leasing Professional invite you return to the Leasing Center following a tour of the apartment and/or community?	<input type="checkbox"/>	<input type="checkbox"/>
69. Did the Leasing Professional explain rental rates positively and with confidence?	<input type="checkbox"/>	<input type="checkbox"/>
70. Did the Leasing Professional convey a sense of urgency?	<input type="checkbox"/>	<input type="checkbox"/>
71. Did the Leasing Professional ask you to complete an application?	<input type="checkbox"/>	<input type="checkbox"/>
72. Did the Leasing Professional ask you to provide a deposit or other monetary commitment for the apartment?	<input type="checkbox"/>	<input type="checkbox"/>
73. If an apartment was not available, did the Leasing Professional ask you to sign a waiting list.	<input type="checkbox"/>	<input type="checkbox"/>
74. Did the Leasing Professional attempt any other closes? Please explain. _____	<input type="checkbox"/>	<input type="checkbox"/>
75. Did the Leasing Professional ask to hold an apartment for you?	<input type="checkbox"/>	<input type="checkbox"/>
76. Did the Leasing Professional attempt to schedule another appointment?	<input type="checkbox"/>	<input type="checkbox"/>
77. Did the Leasing Professional remain interested and enthusiastic throughout your visit?	<input type="checkbox"/>	<input type="checkbox"/>
78. Did the Leasing Professional provide you with any promotional materials?	<input type="checkbox"/>	<input type="checkbox"/>
79. Would you have leased an apartment based upon the Leasing Professional's presentation, not the community itself?	<input type="checkbox"/>	<input type="checkbox"/>

What reason did you give for not leasing? _____

Where you offered a special? If so, what was it? _____

If your needs were not met, did the Leasing Professional refer you to a locator or another community? Please explain.



Closing Comments:

Follow-Up:

Yes

No

81. Did the Leasing Professional follow-up?

Telephone Call ____ Thank You Note ____ E-mail ____

Leasing Professional's overall attitude and impression:

Based on Leasing Professional's presentation, would you have leased the apartment?
Why or why not?

Leasing Professional's strongest points:

Leasing Professional's weakest points:

Leasing Professional's primary closing technique:

Overall comments:

