

#1 BRINGING IN NEW RESIDENTS: BE PREPARED

Instructor Guide



January 2021

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Acknowledgments

SUBJECT MATTER EXPERTS

The NAA Education Institute wishes to thank the many apartment industry professionals who contributed their time and expertise to the rewrite of the Certified Apartment Leasing Professional course.

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Further Acknowledgments

The National Apartment Association Education Institute acknowledges the contributions of countless volunteers who made this program possible. We extend our thanks to all and pledge to maintain the CALP credential as the premier standard apartment industry training program for all Leasing Professionals.

Just for Instructors

The National Apartment Association Education Institute thanks you for your time, talent and expertise in training and developing the next generation of Leasing Professionals.

Whether you are a subject matter expert, a seasoned instructor or new to training, this guide will help you become an even more engaging and effective instructor.

The Certified Apartment Leasing Professional (CALP) program is designed to teach leasing skills to multifamily residential management professionals. It has been recently enhanced to reflect the changing dynamic of techniques, technology and sales demanded by the responsibilities of this position.

This course is targeted for people with at least six months of leasing experience.

For more information about this program or any of NAAEI's education programs, contact your local apartment association or contact NAAEI at **833-86-MYNAA** or **education@naahq.org**.

Using this Guide

This Instructor Guide is identical to the Participant Guide that your class participants have, with the following exceptions:

- The Course Schedule page for instructors provides suggested timing for each component of each module. The participants' version shows only the timing for each module.
- In the left-hand margins of this guide, you'll see a Slide icon [], which tells you what slide to show at that point in the course.
- Also in the left-hand margins, you will occasionally see an “instructor’s note” to suggest something you might want to do, particularly during the suggested Activities.
- This guide includes answers to all questions that the participants will be asked in this course.

Other than the above, the participant and instructor guides are identical and all page numbers are the same for you as they are for the participants.

Preparing to Teach the Course

To give course participants a first-rate learning experience, plan to spend several hours preparing to teach this class.

When to Prepare

Depending on your experience with this course, begin preparing one to two weeks before the scheduled course date. That is enough time to absorb the material without feeling rushed.

How to Prepare

- **Read the Participant's Guide carefully.** Material matches your Instructor Guide, but look for occasions when the students will need to write down slide content or answers. Plan to allow extra time as you present. Note how Participant Guide page numbers align with Instructor Guide numbers.
- **Review the Course Table of Contents.** See yourself as a guide. Knowing and recalling the entire course outline will help you to help students understand where they are in the program.
- **Read the Instructor's Guide carefully.** Get familiar with the organization and flow of the course, as well as the content itself.
- **Mark up this guide.** Write notes throughout. Highlight passages you want to emphasize. Add prompts for your examples and explanations.
- **Practice.** Do a dry run of the material (or at least some of it) in front of willing colleagues or family members. Get their feedback. Find out: What are you doing well? What is one thing you could improve?
- **Preview and practice the PowerPoint slides and videos.**

When it is Time to Teach the Course

- **Do not Read the Slides.** Students have copies of the slides in their handouts. Slide content typically paraphrases what is in the text. Reading it is not helpful and actually might bore your students! Paraphrase or simply refer to the slide.
- **Do not have Students read from the Text.** Not only are students uncomfortable with this but it turns the text into the presentation, instead of your comments and student discussion. Again, retention and engagement plummet!

- **Link Module to Module.** Help the student move from one topic within a course to another. Students like to know where they are in the program and how the subject you are just finishing relates to the next area of learning. Use a simple connector like, “So now that we have learned the basics of the relationship sales process, let’s move to applying this process in real situations.”
- **Use this guide.** Refer to it often to keep the class on track. Using notes will make you look natural, relaxed and even confident.
- **Approach the course as a conversation, not as a presentation.** Keep things open and easygoing. Pick yourself up if you make a “mistake.” Answer the questions you can. Most important, avoid the temptation to be the expert—simply share what you have learned.
- **Keep participants actively involved.** Allow participants to ask questions, share ideas with one another and get as much hands-on experience as possible. Remember: telling is not training.
- **Be yourself.** Participants appreciate (and learn more from) instructors who are not only knowledgeable, but also approachable, personable and dedicated.

Preparing the Classroom

To complete your final preparations, arrive at the training site at least one hour before class begins.

- **Find the Location of these Public Facilities or Services**
Restrooms / Kitchen facilities or vending machines / Emergency exits
- **Prepare Materials**
This Instructor’s Guide (with all your preparation notes in it) / The Participant Guide (one for each participant) / The PowerPoint / Evaluation Forms / Sign-in form (to be turned in to the affiliate office after class)
- **Prepare Classroom and Test Equipment**
Flipchart with stand or whiteboard / Markers / Microphone or sound system (if needed) / Laptop computer with LCD projector

Arrange the tables and chairs in the room so that participants will be able to talk with one another, work in small groups and take notes / Make sure the room is not too hot or cold / Ensure that there is adequate lighting / Write the course agenda on the flipchart or whiteboard

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Message to Apartment Leasing Professionals

Slide 2

The Certified Apartment Leasing Professional (CALP) program is designed to teach leasing skills to multifamily residential management professionals. It has been recently enhanced to reflect the changing dynamic of techniques, technology and sales demanded by the responsibilities of this position. Your managers, supervisors and executives understand your importance to the industry. They recognize you as the key to leasing, renewing and serving future and current residents of your communities.



Slide 3

Bringing in New Residents: Be Prepared is one course in the CALP series.

The complete set of CALP courses is:

- 1. Bringing in New Residents: Be Prepared**
- 2. Marketing and Maintaining your Community**
- 3. Why Your Competition Matters**
- 4. Relevant Laws and How to Apply Them**
- 5. The Sales Process and Building Relationships**
- 6. Effectively Meeting the Needs of Current Residents**
- 7. Market Analysis for Leasing Professionals**

For more information about this program or any of NAAEI's education programs, ask your instructor, contact your local apartment association, or contact **NAAEI** at **833-86-MYNAA** or **education@naahq.org**.



Course Structure and Timing

This course includes four modules and will run for approximately three hours. Each module will include a mix of activities, discussions, watching videos and slides. [Note: the participant guide shows only the module names and times, not the specific components.]

The time structure of the course will be:

Component	Time
Module 1 - The Prospective Resident’s Point of View	35 minutes
Video: The Prospective Resident’s Point of View	
Summary	
Module 2 - Professionalism and Teamwork	45 minutes
Video: “One Band, One Sound”...The Essence of Teamwork	
Professionalism	
Teamwork	
Video: “Copa Airlines”... Create a Clear and Compelling Strategy	
Summary	
Break	10 minutes
Module 3 - Organization, Prioritization and Time Management	45 minutes
Big Rocks	
Organization, Prioritization and Time Management	
Video	
Summary	
Module 4 - Using Your Technology	45 minutes
Using Your Technology to Bring in New Residents	
Video	
Summary	



Slide 5

Introductions

Introduce yourself first and then ask all participants to do the same.

Welcome to the **Bringing in New Residents: Be Prepared**, part of the National Apartment Association Education Institute's Certified Apartment Leasing Professional program!

Your instructor will ask you to participate in the following activity:

Introduce yourself to the group and answer the following questions:

- **Why did you choose to work in the apartment industry?**
- **Why did you choose to become a Leasing Professional?**
- **In what work-related projects are you currently involved?**

[if the class is large, then participants may do this activity in smaller groups]



Slide 6

Learning Goals

At the end of this course, you will be able to:

- **See things from a prospective resident's viewpoint.**
- **Be organized—schedule appointments, keep them, be prepared, maintain records of prospect information (as part of customer service/relationship-building).**
- **Know how to prioritize and multitask.**
- **Be professional—dress appropriately, conduct yourself in a professional manner.**
- **Use your technology efficiently and effectively—email, lead-tracking systems, property management software, etc.**
- **Work in a team with your co-workers (leasing team, maintenance team, management team).**



Module 1 - The Prospective Resident's Point of View

Slide 7-8

THE PROSPECTIVE RESIDENT'S POINT OF VIEW



When a prospective resident is looking for a new apartment home, what factors really affect someone's decision? In the video you're about to see, apartment residents tell us what matters to them.

Based on the size of the class, ask the students to break into small groups of 3 or 4 as you introduce the video. If the class is large you may want to make the small groups 5 or 6. Show the instructional slide and the video. Give groups just one minute to assemble several ideas - gather all ideas and note on a flip chart.

There are no prescribed answers. This is an opportunity for the groups to define what they saw and heard.



The Prospective Resident's Point of View: Question 1 of 2

Slide 9



Think about the video you just watched. What stood out to you as the most surprising things you heard? Name at least two things.



The Prospective Resident's Point of View: Question 2 of 2



Think about the video you just watched. List two comments or issues you heard in the video that may relate to you and your own community. What are they and how do they relate?

Again ask the small groups to discuss their answers for 2-3 minutes and then go around the room to debrief. Discuss how they can apply and point to solutions.

SUMMARY

In the video, you saw some people's unfiltered views about the apartment search process—where they search, what they look for, what makes people want to lease an apartment and what convinces them not to rent.

You can take what you've learned in this module and apply it at your community!



Slide 11

Module 2 - Professionalism and Teamwork

“ONE BAND, ONE SOUND”... THE ESSENCE OF TEAMWORK



Slide 12



Now you'll see a video about teamwork and what that concept really means. After you see the video, you'll be asked some questions about it.

Break the class into small groups (5 or 6 students each) preferably two or four groups, telling groups to be responsible for answering either question 1 or 2. Tell them to watch the video and discuss together their answers to their one question. Give them 5 minutes to assemble their comments. Debrief each group.

“One Band, One Sound”... The Essence of Teamwork: Question 1 of 2



Slide 13



How would you define teamwork? List three characteristics of a good teammate.

The best answers include:

- *Supporting your teammates.*
- *Going out of your way to help your teammates.*
- *Putting the team goals ahead of your personal goals.*
- *Being reliable.*
- *Communicating clearly.*
- *Listening to others.*
- *Treating others respectfully.*

Answers to questions will appear in italics in this guide. In the participants' version of the guide, they see lines to write their answers or to take notes.



Slide 14

“One Band, One Sound”... The Essence of Teamwork: Question 2 of 2



Who is, or was, the best “teammate” you have ever worked with? What did that person do that made you feel that he or she was such a good teammate? Give specific examples if you can.

Give the small groups a minute to come up with one or two examples.

Remind students this question is about a specific teammate, the first question was about great teams in general.

A good sample answer might be:

At my old job, I worked with Kate, another Leasing Professional. Kate was always a pleasure to work with—she was incredibly helpful! Once, I got a flat tire on the way to work and I called Kate—she met with a prospective resident for me since I couldn’t get there and when the prospective resident signed a lease, Kate made sure that our manager knew that I had done most of the work to bring him in! Kate would do anything to help out and that made me want to help her, too.

Let’s discuss your responses.



Slide 15

ACTIVITY

In small groups, discuss some of the ways that working as a team has benefited your community to achieve goals such as occupancy, renewals, outreach, etc. Be prepared to share answers to the following:

1. What did working as a team teach you in that situation?
2. What were the roles of each team member?
3. As a result of teamwork, were the goals reached faster? Did you exceed the goals?

Tell the groups to think of a specific situation they may have experienced, share stories, choose one as a group and then answer the three questions. Give the small groups 5-10 minutes to discuss the questions. Have each group summarize their experiences with the class.

SUMMARY

As a Leasing Professional, you’re a member of a team! And as a member of a team, you’ll need to be a good teammate. In this section, you’ve learned a bit about what good teamwork really means.



Slide 16

PROFESSIONALISM

Leasing Professionals provide critical services and value to apartment communities. Let's look at some of these more specifically.



Slide 17

The Impact of the Leasing Professional

Leasing Professionals are critical to the success of the property because they show and lease apartments, deal with and serve residents and market to prospective residents. Leasing Professionals have an accurate pulse on their market and their own community's impact on the market and even industry. Properties cannot exist without someone performing these tasks. These tasks are typically part of the Leasing Professional's key responsibilities.

Leasing Professionals increase revenue by leasing and renewing apartments to qualified applicants and residents. They enhance the value of the community by marketing and selling the apartments at the most achievable rent rates to qualified prospective residents. They adhere to the industry's regulations and therefore minimize liability for the owner and/or management firm.

Ask each student to personalize the list in their guide by checking off or highlighting those duties he or she is doing now. Ask the students if anyone has any questions about areas they are not performing or about which they are unfamiliar.

Below are listed many of the typical Leasing Professional's responsibilities:

- Comply with all regulatory laws and guidelines.
- Pre-lease apartments on notice.
- Inspect apartments for tour and move-in readiness.
- Accept and process applications for leasing.
- Conduct follow-up telephone calls.

- Communicate with residents.
- Shop and/or visit the competition.
- Review ads, community's marketing materials and websites.
- Collect deposits and pro-rated rent fees.
- Conduct follow-up with prospective residents.
- Recruit referrals.
- Perform outreach marketing activities.
- Write community newsletters.
- Conduct resident satisfaction surveys.
- Conduct warm calls for new move-ins.
- Attend local apartment association activities.
- Demonstrate the features and benefits of the apartment community.
- Accept and process renewal paperwork.
- Answer the telephone.
- Conduct follow-up communications with residents.
- Process service requests.
- Complete market comparable reports.
- Conduct onsite tours for owners or investors.
- Process rental payments.
- Open and close the model apartment.
- Maintain daily, weekly and monthly reports.
- Assist with onsite resident relations.
- Maintain leasing tools (product knowledge kit, brochures, flyers, business cards).
- Prepare lease documents.
- Engage in ongoing professional development opportunities.
- Lease vacant apartments.



Slide 18

Professionalism

Prospective and current residents—and coworkers and management—expect a lot from a Leasing Professional. They look for friendliness and a “human” touch—such as using their name and “personalizing” the leasing presentation. Prospective residents and residents want to do business with a Leasing Professional who is accurate and honest and who follows through on promises. A successful Leasing Professional should exhibit professionalism at all times.



Slide 19

Image and Behavior

A “professional image” is more than just a “polished look”—it’s expressed in pride, competence and integrity in your interactions with prospective and current residents, fellow workers, staff members, owners, vendors and all other people with whom you come in contact. Dress professionally (and in accordance with any company dress code), use appropriate language, always act in an **ethical** manner and treat your coworkers, prospective residents and current residents the way you would want to be treated.



Slide 20

Specialized Knowledge

To be a successful Leasing Professional, you’ll need to have a lot of specialized knowledge. Specialized knowledge includes knowing the specifics of these areas:

- 1) Market Knowledge** is the demographic and product information about your apartment community, its primary competitors and potential future competition including housing being planned and/or under development in the area;
- 2) Product Knowledge** is the thorough understanding of all of the products and services available in your own community, apartment homes, amenities, the surrounding neighborhood and that of your area’s competitors;
- 3) Resident Profile** is specific information that describes the apartment community’s typical residents and their needs, wants and qualifying characteristics.

You need to know about your own community, as well as your competition and the surrounding market, including the demographics, economics, employment, housing and other factors impacting your market. When a prospective resident reaches out to your community, they count on your specialized knowledge to help them make the right decision for them.



Slide 21

Added Value

Your role has two key components: to assist people in finding appropriate housing that meets their particular lifestyle needs and to add value for your property’s owner. As a Leasing Professional, your role should not be simply to answer questions that a prospective resident asks, but to actively assist each prospective resident in finding his or her new home.

Asking questions about what the prospect values is particularly important. Try asking “what is most important to you in this new home?” or “what don’t you have now that you want in this new home?” By asking these types of questions, you can understand what the prospect values and, in turn, reduce vacancy loss, adding value for your property’s owner.



Working Toward Your Property’s Goals

As a professional, you’ll need to keep the property’s goals in mind—not just your own personal goals—at all times. As a professional, you should have specific written goals for specific timeframes: annual, monthly, weekly, daily. For example, one way in which a successful Leasing Professional could align her/his responsibilities with the goals of the community would be to increase the community’s revenue by leasing and completing lease renewals.

Ask students to share some of their community goals.

Summary

From time to time, reflect on your own appearance, behavior, communication and commitment and ask yourself if you’re projecting the “professional image” your prospective residents and residents expect in a Leasing Professional.



TEAMWORK

Teamwork

As a Leasing Professional, your role is to work toward your property’s goals. This role involves working with others at your community—your manager, other Leasing Professionals, a property manager, the maintenance staff—the specifics depend on your property, but you’re not a solo performer, you’re part of a team.

Who does it take to lease an apartment? To renew a lease? To complete a service request? The answer to all of these questions is “a team”. Multiple members in multiple roles combine their skills and duties to complete the job. Consider “team closing”—can your office team work together to help you close new leases or renewals? Be sure your service request is clear, delivered promptly to the maintenance technician and that you “sell” the team to the resident wanting service. It takes everyone together to be successful!



Understand the Team’s Goals

Your company probably has several very explicit goals and possibly some that are not so obvious. For example, high economic occupancy and reduced resident turnover may be the two most obvious goals. Having a “good” reputation in the community

and in the industry may also be a goal, but one that is not as explicit. To work in a team, everyone on the team must understand its goals and the team's plan for accomplishing its goals. When you understand your team's goals and its plan, you can better understand the role you can play in helping the team achieve its goals. That's what being a "team player" is all about.



Slide 25

Understand Your Role

Yes, you are a Leasing Professional. At the same time, you may have multiple responsibilities, or perhaps the team needs you to assume other responsibilities. In what ways, other than leasing, can you contribute to the success of your team and of the community? An important part of teamwork is the full understanding and acceptance of your role, including your teammates' expectations of you and your role. Some of them might have a good idea for modifying your role in some way.



Slide 26

Keep the Lines of Communication Clear and Open

Make sure you are as open and candid as your position allows. Recognize that others have different views and opinions. Be precise in your language, but use tact and diplomacy. Use discretion in all communications - coworkers, residents, vendors. Be the professional that can be trusted. Also, be an active listener. This is the most underestimated part of communication. Avoid making a team member look bad, no matter how much you may think this is deserved. Handle problems on a one-to-one basis whenever possible. Support your teammates.



Slide 27

Network Outside Your Team

Keep open lines of communication with those people who are outside of your immediate team yet are related to your team and your work. Know what is going on with Leasing Professionals in other companies. Know what they are doing and what they are trying. Know key people in the community. It is always valuable to have a team member who understands what is going on in the immediate neighborhood. Work to help your team be successful and the team will help you improve your skills and potential for advancement.



ACTIVITY

Slide 28-30

Break into small groups or discuss as a class the following scenarios.

Scenario 1: Your co-worker worked on Saturday when a new resident was scheduled to come in for a move-in at 9 AM. The new resident approaches you on Monday to let you know that your co-worker did not show up until 9:15 am and they were not happy that they had to wait. How do you handle this?

Scenario 2: Your Assistant Manager recently sent a few move-in files back to you due to errors that you made and as a result, you will not be eligible for your leasing incentive until next month. To make matters worse, a resident came in laughing and told you that they saw your Assistant Manager out drinking on Saturday night. How do you handle this?

Scenario 3: You answered the phone in the leasing office and it was a collection call for another employee. How do you handle this?

After breaking into groups, gently guide each to come up with recommended responses. Give the groups five minutes and then debrief, ensuring they get key takeaways.

Best answers:

Scenario 1: Apologize to the resident and be sure not to say anything negative about your co-worker.

Scenario 2: Do not add to the gossip; change the subject with the resident.

Scenario 3: Do not tell other people you received the call; this situation warrants a one-on-one conversation.

SUMMARY

Being a successful Leasing Professional requires a deep understanding of teamwork. Think about the concepts you've learned here and how you can apply them in your job.

VIDEO



Watch the video clip. As you watch, think about how Kimberly, the Leasing Professional, does—or doesn't—display professionalism and teamwork. After you've seen the clip, you'll be asked to rate the Leasing Professional's performance.

Rate the Leasing Professional



In the clip you just watched, how did the Leasing Professional do in terms of demonstrating teamwork and professionalism? What did she do well and what could she have done better?

The best answer is:

Kimberly spoke nicely and politely to Ray, the maintenance technician. That's definitely a positive quality when it comes to professionalism and teamwork.

However, Kimberly's negative action regarding Ray displayed a complete lack of professionalism and teamwork—as soon as she submitted the service request for Ray, she badmouthed him to her coworker, Sarah!

Kimberly also offered to lie about the size of prospective resident Zach's dog. Not only is that unprofessional behavior, but if she managed to allow Zach to bring his dog, she would be violating the rules of her community and also would be unfair to other residents, who have followed the rules.

Now, lead a group discussion about participants' responses.

CREATE A CLEAR AND COMPELLING STRATEGY



How can you ensure that everyone on the team understands the role that he or she serves in achieving the goals? Can you help each of your fellow teammates understand the important part of the goal that belongs to them and to them alone? What will a maintenance assistant or a housekeeper or an assistant manager do to help the community achieve its goals?

Break the class into three groups. As you introduce the video explain that each group will be assigned one of the three questions to answer together and then share with the class. After viewing the video, give the small groups 5 min. to assemble their answers. Encourage the rest of the class to listen and add other comments as they see fit.



Copa Airlines: Question 1 of 3

What was Copa's strategy to become a great airline?

Copa set specific performance goals—based on how their competitors were performing—and then communicated the goals and how to get there throughout the entire organization. Each employee at Copa, at all levels, knew their role and how they impacted the bottom line. Further, Copa employees bought into the goals and worked together to achieve them. Copa changed its entire culture by empowering their employees at all levels.



Copa Airlines: Question 2 of 3

How can you apply elements of Copa's strategy to a goal you already have in place at your community?

Does your community have specific performance goals? How about income growth or expense reduction plans? Maybe a target for lease renewals or make-ready efficiencies? If not, you'd do well to create these goals. Also, think about how every team member can participate in achieving the goals.



Copa Airlines: Question 3 of 3

How did Copa make sure everyone was involved in the strategy and goals?

Copa used two methods to involve everyone:

- *“Cascading,” or passing the company goals to every level in the company;*
- *“Knitting,” having shared goals between departments or between people, so they have to work together to achieve the goal.*

SUMMARY

In a great organization, the mission cascades throughout the whole organization. Every single person—from top leaders to the front line—knows how his or her role contributes to the overall strategy. Do you know what you contribute to your company's mission? That's something to think about!



Key points in the video included the following:

- Your passion and energy are excited when you know how your role connects to the organization's top goals.
- Sharing strategy from top to bottom is essential so that everyone at every level has goals for achieving the strategy.
- Team members take responsibility for a goal and are empowered to act to move the goal forward.
- You can align everything you do to the strategy when that strategy is clear.



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MODULE SUMMARY

As a Leasing Professional, it's critical for you to always act professionally in any interactions with coworkers, management, prospective residents, or current residents. In this module, you discovered the importance of teamwork. You also learned how to work professionally in your job, including your image and behavior; how to add value to both prospective residents and your property's owner; and how your team can work together toward the property's goals. Finally, you understood the importance of a shared strategy for the organization and how you as a Leasing Professional play a critical role in cascading the mission.



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Module 3 - Organization, Prioritization, and Time Management

“BIG ROCKS”



Slide 40



Your instructor will show a video from FranklinCovey about prioritization. The video is entitled “Big Rocks.” After you see the video, your instructor will ask you to answer three questions about it.

Divide the class into thirds. Tell each third they will be responsible for answering one question after they discuss it. Play the video and review the questions. Give them 5 minutes to discuss their answers. Debrief each group.

Big Rocks: Question 1 of 3



Slide 41



What did the big rocks represent? What about the small green rocks?

The best answer is:

“Big rocks” are true priorities, such as taking care of yourself, service to others, strategic planning, nourishing a key relationship—things that are highly important, but not necessarily urgent. The small green rocks represent small things that come along and are urgent at the time.

Big Rocks: Question 2 of 3



Slide 42



Why is it often so hard to take care of the “big rocks”?

The best answer is:

“Small rocks” come along all the time, especially in your job as a Leasing Professional. There’s always something that needs attention, so it’s easy to spend all of your time on the “small rocks” and never get to the “big rocks.” Small rocks tend to make a lot of “noise” . We tend to respond to them immediately without thinking about what they really are.

Big Rocks: Question 3 of 3



What are the “big rocks” in your work? How can you make sure you find time to attend to your big rocks?

The best answer is:

Each person will have their own answers, but good “big rocks” might include creating a new, efficient process to share leads among Leasing Professionals, designing a new, weekly event for your residents, or creating a template document to help you better keep track of all of your prospective residents. The way to find time to get to the big rocks is to plan and schedule them so that you find time to work on them.



SUMMARY

You’ve seen the key points in the “Big Rocks” video:

- “Big rocks” are true priorities, such as taking care of yourself, service to others, strategic planning, nourishing a key relationship—things that are highly important, but not necessarily urgent.
- When you plan and schedule the truly important things, less important things tend to fall into place.
- Time is limited, so effective people plan and schedule the big rocks first.

Think about your big rocks and how you can make sure they get done!



ORGANIZATION, PRIORITIZATION AND TIME MANAGEMENT

Slide 45

Job Responsibilities and Goal Setting

As a Leasing Professional, you perform a variety of tasks. We looked at an entire list of duties in module 2. This variety is one of this position's best features! The relative importance that you place on specific responsibilities will have a direct impact on your community. In order to decide how to best prioritize your tasks, you need to understand the goals of your community. You can then align your tasks and duties to best meet your property's goals as well as your own professional goals. Your property's goals could include things such as the following:

- Leasing the longest vacant units first.
- Renewing the leases of at least 70% of existing residents.
- Reducing move-outs by 50%.
- Improving maintenance productivity to 100% completions in 24 hours.
- Maximizing market rents.
- Increasing collections to less than 1% delinquent.



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Planning

Establishing your goals is critical, but not sufficient. Once you have established your goals, the secret to achieving your goals is to create a plan to achieve them. For example, consider how you might “plan” to meet a leasing goal of 10 leases in a week. Here's a seven-step process you can use to create a plan:

1. Set and share your goals.
2. Build specific objectives and timelines.
3. Identify barriers.
4. Determine the contacts and skills you have to acquire.
5. Prepare a plan with specific steps to meet your goal and objectives.
6. Measure progress on a regular basis.
7. Revise as necessary.

As you discuss this list, take the suggested goal of 10 leases in a week and walk the students through steps 2-6.



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Prioritization

Setting goals and creating plans give you a good start to being organized and getting things done, but you then need to manage your time and priorities well. As a Leasing Professional, you're constantly handling a variety of tasks and it's all too easy to get bogged down in a relatively less-important task at the expense of more-critical things that come up.

The "Big Rocks" approach helps you make sure that you prioritize the things that are most important, both personally and professionally.



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Time Management

When it comes to prioritization—the concept of determining what tasks are more or less critical and handling the critical ones—focusing on the “big rocks”—first—is the way you manage your time. Time management is a major concern in all professions. Here are a handful of time management tips that can help you as a Leasing Professional:

Ask students to share any time management tips they have used.

- **Use tools**, such as a calendar and an organizer (online or paper-based, whichever you prefer), to ensure that you maintain a list of what needs to be done each day.
- **Know your deadlines:** Be sure to note your deadlines clearly so you know when everything needs to be done. Your deadlines will also affect your prioritization decisions. Always build in “cushion time” in your deadlines for completion, so that you're prepared for those last-minute, unplanned interruptions.
- **Focus:** It's not always easy, with so much going on, but if you have a task that you just can't get done, focus on it and finish it.
- **Work on similar tasks in a “batch,” or group:** It's often more efficient to work on several similar tasks in a row—for example, reply to several leads from your lead-generation system consecutively so you don't have to take the time to bounce from one system—and from one way of thinking about things—to another.
- **Minimize your time consumers:** Sure, everyone needs a break sometimes, but maybe you find yourself on Facebook during the workday, or talking with a co-worker. Make a conscious effort to minimize any time wasters.

With the help of these tips, you'll be able to make the best use of your time.



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ACTIVITY: TIME CONSUMERS AND TIME SAVERS

Let's look at specific time consumers and time savers in your typical day.

Assign the students into small groups of 3 or 4 – you need to have an even number of groups. Using a typical day on the job, assign half to list time savers; assign the other half to list time consumers. Give the groups five minutes and then review and ask students to record answers in their texts.

Time Consumers

- Resident requests.
- Drop-in visits by residents.
- Drop-in visits by vendors.
- Staff requests.
- Supervisor requests.
- Lunch ideas.
- Unannounced owner visits.
- Personal phone calls.
- Equipment failures.
- Package deliveries.
- Drop-in visits by co-workers.
- Change in work activities, etc.

Time Savers

- Clustering all return calls for the early or last part of the day.
- Ignoring off-task conversations.
- Minimizing personal telephone calls to emergency basis only.
- Asking your supervisor for a chunk of uninterrupted time each day to complete reports, etc.
- Creating a “daily to-do” list and prioritizing by importance.



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Multitasking

There has been a lot of recent research done on multitasking (performing several tasks at once) with researchers generally concluding that performance deteriorates significantly when people multitask. This concern is the reason why most states now have laws against using handheld cell phones while driving, for example—it's too easy for most people to get distracted while trying to perform multiple tasks simultaneously.

So as a Leasing Professional, how can you handle all of your tasks? The best way is to follow the prioritization and time management tips and work as efficiently as possible. You don't always need to perform multiple tasks at the same time if you perform your tasks efficiently and effectively.

SUMMARY

In order to be a successful Leasing Professional, you need to be able to handle—and enjoy—the multitude of different tasks that come your way. In order to do so, you'll need to work on strategies for planning and organization, prioritization and time management.

VIDEO



Watch the clip below. As you watch, think about how well Alicia, the Leasing Professional, does—or doesn't—manage her time and priorities. After you've seen the clip, you'll be asked to rate the Leasing Professional's performance.

Rate the Leasing Professional



In the clip you just watched, how well did Alicia manage her time and priorities? What did she do well and what could she have done better?

The best answer is:

Alicia handled a tricky sequence of events like a true professional! She maintained focus on her report when she could, but correctly prioritized tasks that came in—emailing back to a prospective resident, interrupting that email to answer a call that came in, working with a current resident—all while always taking good notes to remember where she was.

Alicia's process allows her to be incredibly productive and provide great service—she didn't make anyone wait, but also performed her tasks well!

MODULE SUMMARY

As a Leasing Professional, it's critical that you use effective tools for organization, prioritization and time management to complete your many and varied tasks. Remember that taking care of the “Big Rocks” first allows you time to complete those items lower on your priority list.



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Module 4 - Using Your Technology

USING YOUR TECHNOLOGY TO BRING IN NEW RESIDENTS



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Introduction

Advances in technology have changed the role of a Leasing Professional in recent years. Today, in order to work effectively as a Leasing Professional, it's critical to have a sound grasp of the programs and websites you use for marketing, lead tracking, communicating with prospective and current residents, and even for checking your community's reputation. Residents, prospective residents, and your manager and coworkers all expect you to use technology efficiently and appropriately.

Property management software packages have expanded their services beyond rental roll and revenue to provide a menu of software that affects virtually every aspect of the Leasing Professional's responsibilities. Major software providers such as Yardi, RealPage, AMSI, MRI, ResMan, Appfolio, to name just a few, are your leasing partners and have added capabilities to their array of offerings such as:

- Lead Generation.
- Call Centers.
- Call Monitoring.
- Lead Tracking.
- ILS Interface.
- Prospect Portals.
- Site iPad leasing.



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The Prospective Resident's Point of View: The Apartment Search

Prospective residents do a huge amount of research online before they ever decide to contact you or your community. In order for your community to stand out to a prospective resident, your online presence needs to be in great shape. Also, since prospective residents are able to find out so much before getting in touch with you, they're already well-informed about your community by the time you first become aware of their interest.

Prospective residents may gather information from a variety of sources. They include:

- Your community's or management company's web site (and those of other communities as well!)
- Your community's or management company's presence on social media sites, including its Facebook or Pinterest page and sometimes its Twitter or Instagram presence.

- Apartment listing sites (shown here in alphabetical order) such as apartmentfinder.com, apartmentguide.com, apartmentlistings.com, apartments.com, craigslist.org, forrent.com, move.com, rent.com and many others (some sites are regional or local in the listings that they carry; others, such as the ones mentioned here, are generally national and cover all areas of the U.S.).
- Mobile apps such as PadMapper, ApartmentFinder, ForRent, RentPath, Trulia Rentals, Zillow Rentals and many more.

It's important to be aware of the ways that prospective residents gather information and the information they'll likely be aware of when you first communicate with them.



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The Prospective Resident's Point of View: Apartment Reviews

Along with researching apartment communities themselves, prospective residents can find sites that tell them what other people thought of an apartment community. It's always good to be aware of what's being said about your community online. Popular sites with reviews of apartment communities include apartmentratings.com, rentlingo, rentersvoice, yelp.com as well as many of the industry's ILS providers, such as apartments.com, apartmentguide and rent.com.

Prospects will likely "Google it" to find your community and any conversation about it. So you should "Google it" too! Be sure to follow any specific protocol your company may have for online reputation management. Reputation management is covered in more detail in the **"Marketing and Maintaining Your Community"** portion of the CALP program.



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Lead-Generation Systems

Your first contact with a prospective resident will often come via a lead-generation system, a software program that tracks online inquiries from prospective residents about your community. The process works as follows:

- A prospective resident expresses interest in your community, usually by filling out their information and clicking a button on an apartment search site or app. Usually, the prospective resident will include contact information and some information about the type of apartment that he or she is looking for.
- The prospective resident's information appears in your community's lead-generation system, which sends a notification to your community (and/or others). In some communities, one person is in charge of responding to leads; in others, the responsibility is shared or rotated across several people.

- A Leasing Professional sends a response to the prospective resident, often using a templated email — a pre-written email form with certain details added—from within the system, to the prospective resident. It’s important that the email response includes any specific details requested by the prospect. If the email looks too generic, the prospective resident may consider it spam and delete it, or might just feel that your community’s approach is not “personal” enough. This initial email begins the communication process, which can then continue via email, telephone, text and eventually in person.
- Some systems provide further information about your apartments to prospective residents and/or even allow people to lease apartments completely via an online process.
- Also, note that some companies are beginning to use text-messaging services in addition to email, as an additional way to offer a prospective residents fast, personalized responses.



The Role of Automated Revenue Management

One type of technology being seen more and more often is the use of automated revenue management pricing. First used by the hospitality and airline industries, automated revenue management systems, often called yield management systems, maximize profitability. These systems use centralized databases of information to help forecast supply and demand, and then price apartments (like hotel rooms or airline seats) daily to maximize their return.

The market, on that day and moment in time, determines consumer pricing for the apartment. The Leasing Professional must be knowledgeable about how the system works at their property—how rents are priced, how different apartment types and lease terms, chosen by the prospect, can determine the rental rate for a particular apartment. Just as we learned earlier in this module, understanding and presenting automated revenue pricing is part of the “Product Knowledge” that comes with your Specialized Knowledge as a professional!

The use of revenue management systems is on the rise in the residential property management business. Over one million multifamily units across 150 markets use revenue management as a tool to generate additional revenue using proactive flexible pricing. Now, more mid-sized operators are seeking these systems as user costs are dropping and results are becoming more widely disseminated.



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Emailing with Prospective Residents

Often, you'll find yourself communicating with a prospective resident via email. This may start out with a templated email response (as described earlier), but will often continue into a back-and-forth email exchange. As you work with a prospective resident via email, here are some things to keep in mind:

- **Be clear.** In a telephone or in-person conversation, it's possible to clarify what you said or clear up any miscommunications quickly. But in an email "conversation," that's not often possible. It's critical to be absolutely clear in your writing.
- **Be concise.** It's not always easy—there's a lot of information you want to provide—but people tend to lose interest when they see a very long email—especially if they're reading on their phone. Be as concise as you can and use paragraph breaks to make your email readable.
- **Check your spelling and grammar.** You're representing your community in your interactions with prospective residents, so spelling and grammar errors will reflect poorly on you and your community. A prospective resident might see your sloppiness as an indicator that the property is sloppily run, so be extra careful.
- **Use a friendly writing style.** When reading an email, a prospective resident can't see your face or hear your tone of voice. So things that might go over well in a phone call or in-person conversation may not be perceived the same way over email. To head off problems, establish a friendly tone in your emails from the start, rather than simply passing on information. Your role is to establish a relationship with the prospective resident, no matter what medium you're using to communicate. Be sure to specifically address all questions asked in addition to your canned response.
- **Follow Fair Housing and Other Laws.** This may seem as if it goes without saying, but you absolutely need to follow the laws when in an email conversation, just as you would over the phone or in person. In some ways, it's even more critical to be careful in email—if you write something that's accidentally discriminatory, it's there in writing, permanently



Slide 60

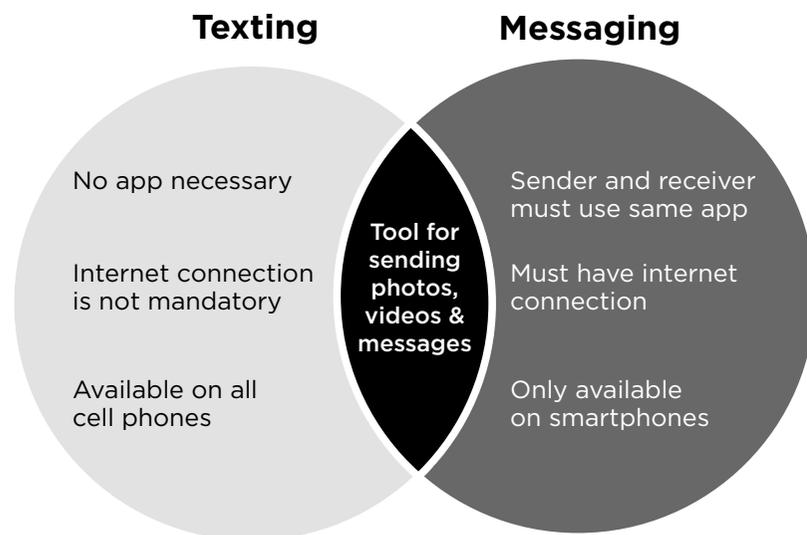
Texting with Prospective Residents

The use of texting with prospective residents has grown exponentially over the last few years. It is now an accepted and important way to establish and deepen a relationship with a potential new resident. eWeek reports that 64% of customers would rather communicate via SMS text message.

Text messaging, or **texting**, is the transmission of short electronic messages between two or more mobile devices. Texting utilizes a cellular network as the medium to send messages. Almost every single cellphone, regardless of "smart" internet technology,

is capable of both sending and receiving texts and messages. Texting and messaging are not the same in these ways:

- **Instant messaging** requires both the sender and recipient to be using the same application. For example, you can't send a message on WhatsApp and deliver it to someone's Facebook.
- **With texting**, you can send and receive messages with any cellphone, regardless of cellular carriers. For example, someone using Verizon can seamlessly text someone with a Sprint plan.
- **With instant messaging**, you can send correspondence to people anywhere in the world as long as they have an Internet connection.
- **With texting**, your international carrier plan will determine if you can send messages overseas. While it's almost always possible, it may just cost a little extra.
- **Instant messaging** can often be done on a desktop, tablet, or laptop. However, if you want to use messaging services on a cellphone, you must have a smartphone.
- **Texting** is inherently native to each mobile device; no need to communicate via a smartphone if you want to text.



Sourced from a variety of outreach methods, a prospective resident can find the community on its website, ILS listing, social media referrals and reputation sites. Once a prospective resident comes to the community, texting becomes a critical tool, as a way to connect immediately into the prospective resident's hand. Statistics indicate that email is often less productive than well written and managed texts.

Most of the tips listed above for good email communication hold true for texts, but perhaps in a more urgent way. A prospective resident will read a text in the moment, whereas an email may be read at a later time, even an hour later. A same day response for an email is a given—a same hour response is the new normal for a text.

A recent “Entrepreneur” magazine article suggests these texting tips:

- **Consider your audience.** This is a concrete representation of your community and you. Business texting is not the same as personal texting
- **Communicate clearly.** It’s short, so re-read to check clarity.
- **Respond promptly.** Failure to respond quickly may appear to signal lack of caring. If you can’t get to it promptly, apologize for tardiness.
- **Use symbols and emojis only when necessary.** Save these for personal transmissions. When in doubt, leave them out.
- **Don’t be long winded.** A two- or three-word text to you likely means someone is busy. If you can’t address it briefly, it’s time for a call.
- **Be patient.** Just like face-to-face conversation, wait for the response. It is rude to continue to overload the customer with multiple texts.
- **Know when to end the conversation.** Be perceptive to when the customer appears to want to disengage. Don’t continually ask, “Are you there?”



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Online Communication Systems for Current Residents

Many communities provide online systems, called “resident portals,” for use exclusively by the community’s residents and staff. These systems allow residents to pay their rent, enter a service request, communicate with the leasing office and even sometimes communicate with each other. You’ll want to be familiar with your community’s system, including your own role in working with current residents and so you can highlight the online system as a key sales point when working with a prospective resident.



ACTIVITY: PRACTICE WRITING EMAIL RESPONSES TO PROSPECTIVE RESIDENT INQUIRIES

In small groups, share your email responses to these inquiries.

Inquiry 1

Name: Jessica Berg

I am looking for a 3 bedroom/2 bathroom within 60 days with a price range between \$1500 and \$1750. I have a dog and want to make sure you accept pets. I also am looking for a full-size washer and dryer included.

Inquiry 2

Name: Julie Fortuna

I am looking for a 1 bedroom downtown. I just graduated from college and will be starting my new job in 30 days. I am going to be taking the subway to work so being near the subway is important to me. I do not want to spend more than \$1100 in rent.

Inquiry 3

Name: Evan Willingham

I am flexible with my move-in date as I just put my home on the market. I need an unfurnished 2-bedroom apartment with stainless steel appliances. My price range is between \$1200-\$1500 and I would like the first floor if possible.

Have students share and compare their email responses to the inquiries. Reinforce the tips the classed discussed, including the need to be clear and concise, to check spelling and grammar, to use a friendly writing style, and to follow Fair Housing and other laws.

VIDEO



Watch the video clip. As you watch, think about what Mike, the Leasing Professional, does well and what mistakes he makes. After you've seen the clip, you'll be asked to rate Mike's performance.

Rate the Leasing Professional



In the clip you just watched, how did Mike, the Leasing Professional, do? What did he do well and what could he have done better?

The best answer is:

Mike was doing a great job of reviewing what people were saying about his community, Platinum Apartments, online, to see how current and prospective residents view the community.

Even better, he read the online reviews carefully, thought about them along with what residents had told him and planned to investigate the potential problems with the fitness center.

He also dug deep into a discussion on a local blog to find positive comments about his community's roof deck and planned to include that in his discussions with prospective residents. Another great thing!

Mike fell short, however, in his email interaction with Laura, the prospective resident. He was way too casual with Laura—even using “U” for “you,” which is not professional—and pushed him to come look at an apartment without asking any questions about Laura's needs.

Mike missed an opportunity to look up the details of Laura's friend's earlier visit using the property management software. Mike could have used those details to close Laura!



Virtual Leasing with Prospective Residents

In addition to the methods covered above, you will likely be interacting with prospect residents virtually. In early Spring 2020, Abodo surveys reported that not only were Google searches of apartments down by 40-50%, but that social media engagement was up 100%. Many companies are estimating that one third to almost one half of traffic is coming from social media sites. Today's customers are more and more comfortable with distance leasing.

Virtual leasing includes a variety of options and technologies:

- 1. Video tours - live or recorded -** can be conducted using video chat apps like Skype, Google Hangout, Apple Face Time or Zoom. These can be created as permanent generic tours or personalized guided tours.
- 2. Website demonstration -** a Leasing Professional can use the phone to “walk” a customer through the website. Both callers are on the website but not connected. A guided website demonstration uses screen sharing and WebEx or GoToMeeting in addition to those tools mentioned previously.
- 3. Self-tours -** these tours can be recorded and designed to auto-play when the customer enters an apartment home or model. Geo-locating software is used. Or the Leasing Professional can remotely walk the person through the actual apartment home, using streaming access.
- 4. Phone calls** can easily turn into instant video chats if there is screen sharing access and the Leasing Professional is ready in the moment. Recorded tours can easily be downloaded or sent to customers as a link, but a live, spontaneous tour is very effective. A variety of third-party industry partners can help to provide the access and create professional tours. Just remember to keep them unique. 86% of Abodo customers said that authenticity in the tour was more important than anything else.

See Course 5 The Sales Process and Building Relationships for a deeper discussion of virtual sales techniques.



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MODULE SUMMARY

In order to work effectively as a Leasing Professional, it's critical to have a complete understanding of the software and websites you use for marketing, lead tracking, communicating with prospective and current residents and even for checking your community's reputation. In this module, you've learned about uses of technology in your role and how to make the most of them.



Course Summary

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You should now be able to:

- See things from a prospective resident's viewpoint.
- Be organized—schedule appointments, keep them, be prepared, maintain records of prospect information (as part of customer service/relationship-building).
- Know how to prioritize and multitask.
- Be professional—dress appropriately, conduct yourself in a professional manner.
- Use your technology efficiently and effectively—email, lead-tracking systems, property management software, etc.
- Work in a team with your co-workers (leasing team, maintenance team, management team).

You can take these skills back and apply them on the job!

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