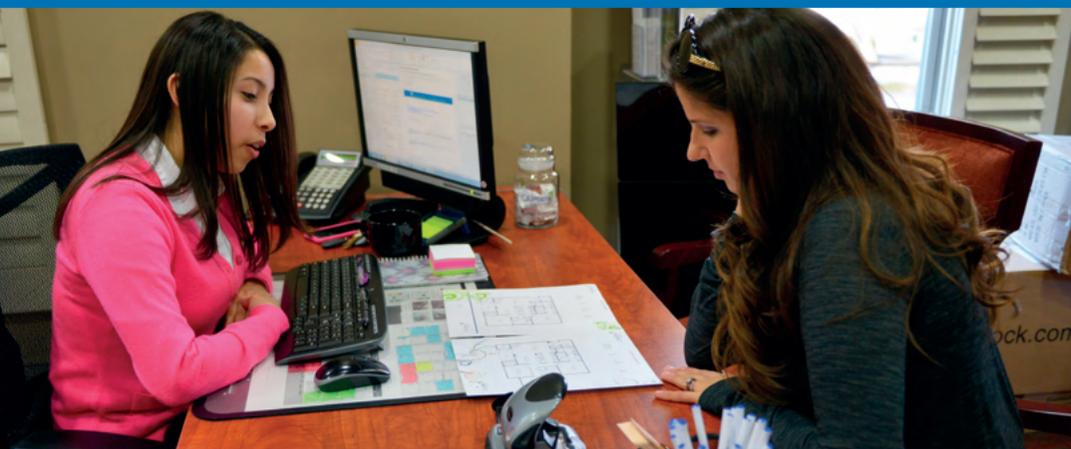


# #5 THE SALES PROCESS AND BUILDING RELATIONSHIPS

## 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.

### Lead Subject Matter Expert

**Susan E. Weston**, CAM, CAPS, NAAEI Faculty

Licensed Texas Broker

**The Susan Weston Company**

972-308-6092 Office

972-415-6299 Cell

[susan@susanweston.com](mailto:susan@susanweston.com)

### CALP

**Certified Apartment Leasing Professional**

**NAA Education Institute**

**4300 Wilson Blvd., Suite 800**

**Arlington, VA 22203**

**833-86-MYNAA**

**[education@naahq.org](mailto:education@naahq.org)**

**[naahq.org](http://naahq.org)**

## 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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Slide 2

## Message to Apartment Leasing Professionals

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

**The Sales Process and Building Relationships** 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 Schedule

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:

<b>Component</b>	<b>Time</b>
<b>Module 1 - The Foundations of the Relationship Sales Process</b>	<b>50 minutes</b>
Introductions	
The Foundations of the Relationship Sales Process	
Empathic Listening: Steps to True Understanding	
Summary	
<b>Module 2 - Applying the Relationship Sales Process</b>	<b>1 hour</b>
Activity: Moving to Wolf River?	
Applying the Relationship Sales Process	
Working with a Prospective Resident: Best Practices	
Working with a Prospective Resident: Virtual Leasing	
Managing Objections	
Summary	
<b>Break</b>	<b>10 minutes</b>
<b>Module 3 - The Transition from Prospect to Resident</b>	<b>50 minutes</b>
Transitioning from a Prospect to a Resident	
Summary	
<b>Module 4 - How Well Are You Doing?</b>	<b>20 minutes</b>
Introduction	
Activity: How Well Are You Doing?	
Summary	



Slide 5

## Introductions

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

Welcome to the **Sales Process and Building Relationships** course, 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:

- **When you are speaking with someone on the phone, how can you tell they are listening to you? How can you tell when you are face-to-face?**
- **A prospect's objections can derail a sales presentation. How do you get prepared to answer any concern a prospect may give you?**
- **What is your best suggestion for making sure move-in day goes smoothly for the new resident?**

*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:

- **Get to know a prospect's needs.**
- **Match your community's features to the prospect's needs.**
- **Properly conduct a positive move-in experience.**
- **Support and meet the needs of future residents after the lease is signed, through transition to being a new resident.**
- **Evaluate your sales performance.**



# Module 1 - The Foundations of the Relationship Sales Process

Slide 7



## Introduction

Slide 8

As a Leasing Professional, a significant part of your job involves “selling”—that is, turning a prospective resident into a resident. An effective sales approach is usually **relationship-based**—you form a relationship with a prospective resident and help the prospect see how your apartment homes are the right ones for his or her needs.

Successful relationship selling depends upon your understanding that your role involves more than just creating rapport and developing a connection with your customers. You are a Leasing Professional with specialized knowledge and responsibilities. Your part of the relationship with the customer must include your duty to 1) teach; 2) tailor your message; and 3) take control of the presentation.

There are several key areas to know in order to relationship sell effectively. We'll cover those in the following pages. They include:

- Knowing your market, prospects, message and product.
- Understanding each prospect's needs by asking questions and listening.
- Using a personalized approach to selling based on emotional appeal.
- Closing.



## Knowing Your Market and Prospects

Slide 9

We live in a digital world where nearly anything can be found with a click of a mouse or a search on a tablet or smartphone. Our buying decisions are heavily influenced by the Internet and by social media tools. Prospective residents will generally be very familiar with your competitors and with your own community's online presence and reputation, even before they ever contact you. This means that as a Leasing Professional, you need to do your homework. What do your prospective residents learn about you before they ever pick up the phone, or send an email or walk into your office? Don't just simply repeat what they already know when you are connecting with your customer.

Do frequent research on what people are saying about your apartment community, what your competitors are doing and not doing and what the trends of the real estate market are. What is happening in your neighborhood with transportation, improvements, retail and jobs? Are these factors causing shifts in the real estate market? How are these trends influencing the purchasing power of the prospective residents? What can you understand about the characteristics of the emerging generation of prospective residents and how to best work with them?

When you know your market and you know what your prospective resident can find out about you, then you can customize your questions instead of just repeating information they already know!

“Marketing and Maintaining Your Community” and “Why Your Competition Matters” in this CALP series get into more detail about how to survey and “shop” your competitors and how to monitor and manage your community’s online reputation.



Slide 10

### ***Knowing Your Message***

Before they even first contact you, today’s prospective residents typically know a lot about your community—they’ve researched you online through your property’s or management company’s website, Internet listing services and apartment ratings websites and may have spoken with people about your community via social media, along with using “traditional” methods such as speaking with friends in-person or by phone.

As a Leasing Professional, it’s critical for you to know what “story” is being told about your apartment community online. By understanding what things prospective residents already are likely to know about your community, you can avoid emails and phone conversations in which you do a “data dump” of information that the prospect already knows! In order to be able to do this, you need to know your property’s online “story” inside and out. Plus, you’ll seem better informed to prospective residents when you know exactly what’s online about your community and where.

Asking a prospective resident “How did you hear about us?” helps you find out if the customer has already seen pictures, descriptions and probably even your pricing—allowing you to better tailor your conversation to the prospect and avoid taking your time—and the prospect’s—going over information that the prospect already is familiar with. You’ll still want to reinforce key points, but can avoid spending time going over unnecessary details.



Slide 11

### ***Knowing Your Product***

Know the ins and outs of your product—your community’s apartments, floor plans, features, amenities, services, neighborhood and any specific advantages over the competition. The importance of having complete, comprehensive knowledge cannot be overstated.

The more you know, the better equipped you are to be successful. How much do you know about cable and Internet options, average utility bills, water billing, unique features of certain apartments? Do you have enough facts and suggestions about your apartment community to outshine your competitors?

Being well versed in your product is crucial, but be sure to deliver all information in a way that matters to the particular prospective resident. Think about how the prospective resident will benefit from the features and information you are explaining.



Slide 12

## **The Art of Asking Questions**

Understanding a prospective resident's needs and interests is perhaps the most important part of the sales process. It holds the key to unlock a prospective resident's interests and concerns and it allows you to effectively sell to the specific person's needs. Asking the right questions helps you gather better information, build stronger relationships with your prospective residents and improve your sales performance. Do use careful and considerate phrasing – your customer does not want to feel like they are being interrogated.

Ask open-ended questions that elicit the prospective resident's needs, interests and feelings. Open-ended questions usually begin with “what,” “why,” “how,” “tell me”, or “describe”.

Sample questions include:

- What are you looking for in an apartment home?
- What features are important to you?
- What concerns do you have?
- Why are you looking to move?
- How do you picture yourself decorating your new apartment home?
- What prompted you to look into our apartment community?
- Tell me what you're looking for in terms of neighborhood.
- Tell me what brings you out to look for an apartment today?
- Tell me what interested you most on our website.
- Describe your ideal new home.
- Tell me what interested you most about our website?

*Ask students which of these or other are most comfortable for them.*



Slide 13-14

## **ACTIVITY:**

### **Gina Asks Qualifying Questions**



Gina greets Karen with a handshake, has her property information with her and begins to ask qualifying questions. What questions does Gina ask and what answers does she get?

*Possible Answers Include:*

- *What is your name? (Karen)*
- *Who will live in the apartment? (Karen and fiancé Jackson)*
- *Who else will live in the unit? (a cat)*

- *When will you be moving? (three weeks)*
- *Where will you work? (Dynamic Solutions)*
- *What do you do? (operations manager)*
- *How did you hear about us? (from HR department at work)*
- *Where do you live now? (Nashville)*

While asking qualifying questions, how is Gina able to connect with Karen?

---

*Possible Answers Include:*

- *Offered her congratulations on Karen's engagement*
- *Explained that many residents have pets*
- *Pointed out that the property is convenient to Karen's work*
- *Promised to follow up and thank employer for the referral*
- *Sold the area for shopping and things to do*

Discuss whether Gina should have asked Karen to sit down for so many questions.

---

*Possible Answers Include:*

- *Opinions may vary. Ask students to provide reasons for their answers.*



### **The Art of Listening**

*Slide 15*

In order to build a good rapport with a prospective resident, it's critical to be a good listener. As a Leasing Professional, it's easy to be distracted by all of the tasks you're working on and all of the prospective residents you're working with—but you need to discipline yourself to block out distractions and listen carefully to each prospective resident.

Good listening is a key attribute that will give you clues about what a prospective resident desires, what is being said and implied and what it would take to move things forward. In order to succeed as a Leasing Professional, you must commit to deep listening and understanding the prospective resident's point of view.



Slide 16

## **Controlling Distractions**

In order to be sure that you can focus on a prospect's needs, make sure that you do what you can to limit distractions in your environment, particularly when you're speaking with a prospect on the phone.

Things you can do to limit distractions include:

- Turn your chair to face the wall rather than facing coworkers.
- If you're in an enclosed office, consider closing the door.
- Open up your website while you talk so you can help a prospective customer better visualize your community.
- Avoid trying to perform other tasks while you're on a call with a prospective resident—"multitasking" in this way has been shown to reduce performance by distracting you!



Slide 17

## **A Personalized Approach to Selling**

When you discuss and show your apartment homes and community, use the selling technique of creating "emotional appeal." This is a technique, in which you look to find a way to create personal meaning and value to a prospective resident. Successful "emotional appeal" approaches typically involve connecting features and qualities of your community with a prospective resident's needs and interests—which means you have to listen carefully in order to understand the person's needs and interests!

Emotional appeal answers the question "so what?" for the prospective resident. It goes beyond a feature's benefit to how it matters. If a prospective resident has told you they raise violets—then the eastern window exposure adds the benefit of morning sun and the emotional connection of a happy new home for the violets.



Slide 18-19

## **ACTIVITY:**

### ***Gina and Marcus on the Tour***



How does Gina uncover one of Marcus' hot buttons?

---

*Possible Answers Include:*

- *She asked Marcus what he liked to do in his spare time. This allows her to connect in a non-invasive manner.*

Gina replies to Marcus' answer by calling him "honey." Discuss.

---

*Possible Answers Include:*

- *While Gina may have wanted to be friendly, a comment like this could offend a customer.*

How does Gina respond to Marcus' comment that he has lots of friends and likes to entertain? What does Gina offer?

---

*Possible Answers Include:*

- *Gina points out the roofed picnic areas with grill areas and horseshoe pits.*

When Marcus asks about a feature the property does not have, how does Gina respond?

---

*Possible Answers Include:*

- *Gina admits that they do not have a sand volleyball court but is ready with a suggestion for the nearby park. This takes market knowledge on Gina's part.*



Slide 20

## **Closing**

"Closing" generally refers to the final step in the sales process, in which you ask a prospective resident to lease an apartment. Closing successfully becomes easier if you have thoroughly understood the prospective resident, developed a great rapport - (remember - teach, tailor and take control!) and given a great presentation. Also, good closing is about discovering the objections or obstacles that the prospective resident may have. Identify and bring the objection to the table and provide a solution that will result in the prospective resident signing the lease!

Closing also occurs at each step of the sales process—meaning "get a firm commitment from the prospect to move to the next step." For example, if you have a phone conversation with a prospective resident, get a firm commitment from the person by making an appointment to come to your property to see an apartment rather than just leaving things open. Being able to "close" each step of the sales process is critical to your success. If the customer isn't ready to make a commitment and you don't close, then at least let the prospective resident know what the next step is and ask permission to follow up with them again.

## **Summary**

As a Leasing Professional, a significant part of your job involves "selling," which is much more than simply hoping a prospective resident likes an apartment and signs a lease! A successful sales process involves building a relationship with a prospective resident and meeting his or her needs.



## EMPATHIC LISTENING: STEPS TO TRUE UNDERSTANDING



Your instructor will show a video from FranklinCovey about how to listen well. There will be a brief introduction, followed by a video entitled “Empathic Listening: Steps to True Understanding.” After you see the video, your instructor will ask you to answer questions about it.



### *Empathic Listening: Question 1 of 2*



What steps did the woman take to gain true understanding?

---

*The best answer is:*

*The woman tried to discover what her son’s underlying problem was—what was driving him to think about quitting school—by reflecting what her son was saying in her own words. She was committed to understanding without imposing any advice, judgment, or preconceived end in mind. She sought to sincerely understand her son’s point of view and feelings, which helped him open up to talk about the real underlying issue.*

*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.*



### *Empathic Listening: Question 2 of 2*



What is the benefit of listening empathically to others in the workplace?

---

*The best answer is:*

*Listening empathically to others in the workplace provides effective results in interpersonal relationships in teams, in sales and in organizations. It promotes sincere and genuine relationships that emphasize understanding each other’s feelings and needs. In addition, empathic listening cultivates a culture of openness and true understanding that makes people feel respected, listened to and cared for. As a result, it will increase team spirit, productivity, morale and loyalty—and sales!*

*Think about how you might be able to discover the real underlying problem with 1) a make-ready technician who is struggling with declining performance; 2) another Leasing Professional in your office who is new and trying to get up to speed quickly; or 3) a resident who is too upset to calmly state his concerns. Empathic listening would make a difference!*



The heart of the sales process is discovering the real needs and issues of your prospective residents. As a Leasing Professional, you can be more effective by understanding your prospective residents through empathic listening. This is the key to make your leasing presentation stand out from your competitors. Something to think about is how you can commit to improve your empathic listening.

The video included the following points about empathic listening:

- It is listening with the intent to understand by reflecting on what the speaker is feeling and saying in his/her own words.
- It is not about agreeing or disagreeing, but simply about understanding another's point of view and feelings.
- It is the key to effective communication, solid relationships and problem solving.

## **SUMMARY**

As a Leasing Professional, a significant part of your job involves selling. In this module, we've discussed keys to following a good sales process, with an emphasis on developing a good rapport with each prospective resident, by listening empathically to their needs and concerns.



## Module 2 - Applying the Relationship Sales Process

Slide 25



### ACTIVITY: MOVING TO WOLF RIVER

Slide 26



In the video clip, you'll see a Leasing Professional from Wolf River Apartments, a large suburban apartment community, interacting with a prospective resident via email. As you watch the clip, think about what the Leasing Professional is doing well, or not so well.



### Rate the Leasing Professional

Slide 27



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

You may want to discuss participants' answers, as well as the "best answer," with the participant group

The best answers include:

- *Claudia did a great job of responding quickly to Julie's initial email. However, when Julie wrote back quickly—indicating strong interest—Claudia missed an opportunity by waiting an entire day to respond again.*
- *Claudia did a nice job of beginning with a templated email response.*
- *Claudia didn't ask questions that would uncover Julie's needs.*
- *Claudia really made a mistake in telling Julie that she has an apartment that would be great for her as long as she doesn't have any young children. It's a violation of Fair Housing laws to allow "familial status" to be relevant and Claudia is putting herself and her company at legal risk by saying this.*
- *Claudia did ask Julie to come see an apartment, but didn't "close" very well. She didn't get Julie to commit to a specific date or time and Julie appeared to be leaving things very vague. It wouldn't be surprising if Julie never came to see an apartment.*

Now, lead a group discussion about the participants' responses.

### Summary

You've seen a realistic example of a part of a relationship sales process, including what can go wrong! In the next section, you'll see some key things to remember as you work through the sales process. As you read them, think about Claudia and her experience.



## APPLYING THE RELATIONSHIP SALES PROCESS

Slide 28

### *Introduction*

“Sales” is far from a one-time event; as we have already seen, it’s a process! As a Leasing Professional, your sales process really starts with your community and its marketing approach and reputation. Prospective residents often study your community online before ever getting in touch with you, so there’s a part of the “sales” process that happens before you are ever involved.

Once a prospective resident does reach out—whether you’re in touch via e-mail, telephone, or in person—you need to be well-informed and knowledgeable about your community and the market. Then, you need to follow a personalized approach to selling. In this section, we’ll cover the major steps of the sales process.

### *Key Steps in the Relationship Sales Process*

After you’ve established rapport with a prospective resident, there are three key steps to the sales process—though you may often repeat these steps as you continue to work with a prospective resident. The key steps are:

- The Needs Assessment.
- The Presentation.
- The Close.

In the following pages, we’ll cover each of these in more detail.



Slide 29

### *The Needs Assessment*

This first step may be the most important step of the sales process because it allows you to determine how you and your community can meet the prospect’s needs. In order to be an effective salesperson you first must understand what those needs are.

Remember that one of your relationship-building roles is that of teacher – you have specialized knowledge of your community and now you must teach the prospective resident what you know and tailor your message to what he or she needs.

Asking good questions will not only help you determine how you can best meet the prospect’s needs, but also builds a rapport with the prospect and helps the prospect build trust and confidence in you. In relationship selling, these are critical qualities!



## ACTIVITY:

### Slide 30-31 *Asking Questions to Sell the Property*



How does Gina quickly connect with Marcus when he visits the office?

---

*Possible Answers Include:*

- *Gina recalls how nice it is to meet him in person and asks how the move is going, mentioning his girlfriend Sandra.*

Gina recaps all the items Marcus mentions that he and his girlfriend want in their new home. How is this beneficial?

---

*Possible Answers Include:*

- *This way Marcus is reminded about all the good things about the new apartment.*
- *It triggers a conversation that Sandra and he had discussed just the previous day.*

Marcus thinks he wants a fireplace but expresses concern about the cold weather. How does Gina respond? Discuss any potential risk in this answer.

---

*Possible Answers Include:*

- *Gina explains that the winter is not that bad and that he won't have to worry about icy sidewalks or driveways.*



### Slide 32 *Open-Ended and Closed-Ended Questions*

In Module 1 of this course, we discussed open-ended questions that allow the prospective resident to talk about his or her needs, interests and feelings. Open-ended questions tell you a lot about your prospective resident's desires. Questions like "what's important to you in your new home?" or "what would you like in this apartment that you don't have now?" give you great insight into where you can fill needs. By asking open-ended questions and listening carefully to the answers, you can establish a relationship with the client and best meet his or her needs.

You'll also want to ask certain closed-ended questions. These are specific questions, designed to elicit specific answers that provide you with factual information—like occupants, vehicles, pets, rental rate, move-in date. The most common closed-ended questions you'll ask are "What size apartment are you looking for?" and "When you do want to move?"

By asking lots of open-ended questions and key closed-ended questions, you can gain an understanding of a prospective resident's needs and determine how to match your community to his or her needs.



### **The Presentation**

Slide 33

Whether you're on the telephone, interacting over email, or meeting in-person, certain elements of your interactions with a prospective resident will be—and should be—a presentation. Step 2 of the sales process is the presentation, which includes the features and benefits of your community and when in-person, giving a tour of the community and showing a model or vacant apartment.

A “feature” is an item or an amenity. It is generally a thing such as a ceiling fan, a floor level, a fitness center. A “benefit” is what the feature does for the resident. The fan moves the air and saves energy; a floor level improves a view; a fitness center adds convenience.

The key to a good presentation, in any format, is to focus on matching the prospect's needs to the benefits and features of your community. For example, if you know that a prospect works near your community, be sure to highlight that point. If a prospect loves to work out and you have a great fitness center, talk it up!



### **The Close**

Slide 34

There's a famous term in sales circles called ABC—Always Be Closing. “Closing” generally refers to the final step in the sales process, in which you ask a prospective resident to lease an apartment—but you want to be thinking about the close at all steps of the process.

Also, as you saw in module 1 of this course, be sure to “close” at each step of the sales process—meaning “get a firm commitment from the prospect to move to the next step.” For example, if you have a phone or email conversation with a prospective resident, get a firm commitment from the person to come to your property to see an apartment rather than just leaving things open.

### **Summary**

“Relationship Sales” is far from a one-time event; it's a process! If you're buying a box of Kleenex at a drugstore in a town you will never visit again, you have a brief one-time encounter for this transaction. This is far different from what the Leasing Professional establishes with his or her customers.

When working with a prospective resident, whether over email, telephone, or in person, think carefully about the sales process that you're following—and always be closing!

# WORKING WITH A PROSPECTIVE RESIDENT: BEST PRACTICES

## *Introduction*

As you work with prospective residents, there's a sales process to follow, as you've seen. There are also certain best practices you should follow and we'll cover those on the following pages.



Slide 35

### ***Answer Your Phone***

When you receive an incoming phone call, answer the call if at all possible. An unanswered call is a missed opportunity—prospective residents might not even leave a message! If the caller leaves a voice message, an average of 6 callbacks may be required to recapture that prospective resident's interest. Many companies use call centers or call tracking software – all are designed to capture all calls and ensure a quality conversation as the beginning of a relationship.



Slide 36

### ***Respond Quickly to Emails***

When you receive an incoming lead, via email or a lead generation system, it's critical to respond quickly. Prospective residents expect a fast response and you might miss an opportunity if you do not respond quickly.

Most companies have specific guidelines for responding to electronic leads. A good general guideline is to respond to any initial lead as soon as possible and always within one hour. Plan to follow up and respond again if you get no reply.



Slide 37

### ***Use Your Community's Email Template for Your Initial Email Response***

Most companies have an email template to use for initial responses. This template helps you respond quickly and consistently with a well-planned reply. If your company has a template, use it! If it doesn't, think about creating one.

When you use the template, however, it's critical that your response does not come off as generic and impersonal. Be sure to address any questions the prospective resident asked in their initial contact. For example, if a prospect asked about the pet policy and the community template doesn't offer this information, be sure to add it in—and do so near the beginning of the response, so it's immediately clear to the reader—your prospective resident—that you have personalized your message.

Even when using the template as a base for your message, include photos and floor plans and ask questions of the prospective resident—treat this email as a key part of the sales process, which it is!



### ***Ask Questions in the Email about the Prospective Resident's Needs***

Slide 38

As a salesperson, part of your job is to elicit from the prospective resident what his or her specific needs are. Ask both specific questions—e.g., “What size apartment are you looking for?”—and open-ended ones (“What are you looking for in an apartment?”). If the prospective resident has included a phone number in the email—by all means call and begin the prospective resident relationship telephonically.

The more you know about the prospective resident's needs, the better you can match those needs to your property and to the way you describe your property to the prospective resident.



### ***Follow Fair Housing Laws***

Slide 39

It's critical to follow Fair Housing laws in all of your interactions. Fair Housing laws prevent housing discrimination and failure to follow them can put you and your property at legal risk—and is unfair to prospective residents.

Fair Housing laws prevent discrimination against anyone based on race, color, religion, national origin, sex, disability, or familial status.



### ***Suggest Specific Times for the Prospective Resident to Visit Your Community***

Slide 40

“Closing” refers to completing a sale, but it also refers to completing any step of the sales process. A good salesperson is a good closer, at every stage of the process.

To close, ask for a firm commitment; for example, in the clip you saw earlier, Claudia didn't ask Julie for a specific date and time that she would come see an apartment, she just let the conversation end.



### ***Take Good Notes***

Slide 41

You'll be working with a lot of prospective residents and no one expects you to keep everything straight in your head—that's not even a good practice! Instead, fill out a guest card for each prospect, either online or on paper and maintain good, clear, comprehensive notes about each prospect's needs.

It's critical that you take good notes throughout the sales process, not just after the initial contact. Good notes have a number of benefits:

1. They enable you to have personalized interactions with the prospect throughout the sales process.
2. They help you build a stronger relationship with the prospective resident.
3. They help other team members who might need to assist the prospective resident when you are not around (for example, if it's your day off).

Be sure to stay away from any notations or comments – intention or unintentional – relative to fair housing discrimination! Focus on the prospective resident’s wants and needs and specific details about the call or the visit. The more detailed your notes, the more meaningful and specific your follow-up communication can be. Good notes also allow the leasing team to share information so that everyone can care for this customer.



### ***Be Professional and Pleasant***

Slide 42

It’s critical for you to always be professional and pleasant to prospective residents (and to coworkers and current residents!) Course 1 in this series covers professionalism and team work in more detail. Some good, specific rules to follow include:

- Answer the telephone professionally—e.g., “Hello, Greenview Apartment Homes, this is Lindsay, how may I help you?”
- Elaborate on the benefits of an apartment for a particular prospect before quoting rental rates.
- Be positive about the rates and the unique community features that are included in the price. Build the value of your apartment home and your community.
- When discussing a competitor, always do so in a professional way, without “slamming” them. Even if a prospective resident had a poor experience at another community and wants to “vent,” keep the conversation’s tone professional and don’t pile on!
- Always remain pleasant even if you cannot schedule an appointment.
- Leave prospective residents with a positive feeling. You never know when they may call again or refer a friend. Your kindness will go a long way!
- When communicating in writing—via email or text message—be sure to check your grammar and spelling. If your writing is sloppy, the prospect will emotionally feel as if your community is poorly run, too! Texting presents many opportunities to abbreviate. Be careful to stay professional – avoid “lol” or “idk”, etc.
- Use a friendly tone but don’t be overly casual. This is a particular danger when writing emails or texts—you want to be friendly but also be professional at all times. Avoid text-message “slang” and emoticons.
- When giving a tour, make sure to keep the prospective resident’s needs in mind and connect what you show to the person’s needs. Don’t give a “generic” tour!

### ***Summary***

There’s a lot to keep in mind when working with prospective residents, but the more you think about it and practice, the more it becomes second nature. In this section, you’ve learned key principles to follow.



Slide 43

## WORKING WITH A PROSPECTIVE RESIDENT: VIRTUAL LEASING

Both technology itself and heightened consumer demand now allow prospective residents to check out potential apartment homes without ever being in the presence of a leasing professional. This includes virtual tours, video chats and even “self-guided” chats and tours. Prospects can make an appointment and see a real, physical apartment – their future home – without a real, physical leasing professional. What tools do you have at your disposal and how will you continue to offer a first-class, personalized presentation for prospective residents?

Just listen to the feedback from surveys conducted in Spring 2020 by experts at Grace Hill, RentCafe, Abodo and Edge2Learn:

1. Edge2Learn reports that prospective residents were offered an average of 1.2 types of virtual tours. Of the tours offered, the most effective in ranked order were Screenshare, Personalized Face Time Tour and personalized recorded tour and email. Generic videos and walking the prospect through the website did not score as high.
2. 60% of renters say they must see photos and floorplans in order to consider leasing an apartment. (*Abodo*)
3. 85% of renters interviewed stated that they need to see digital media of the actual units they are considering. Model unit media is not sufficient. (*Abodo*)
4. 77% of renters explicitly say they will not commit virtually to a lease without either a pre-recorded video tour or a FaceTime tour of the unit they are considering. (*Abodo*)
5. Grace Hill finds that 72% of consumers would rather use video than any other channel to learn about a product or service.
6. 82% of customers said their virtual tour was self-guided. (*Grace Hill*)
7. 48% of customers said their virtual leasing experience did not give them sufficient information to make a decision; only 14% said they were “very satisfied” with their experience. (*Grace Hill*)

Clearly, virtual leasing has a place in your sales toolkit, and the sales techniques and relationship-building skills already discussed in this course are clearly important as we see in the above surveys. As the Edge2Learn results show, there are a variety of types of “virtual leasing.” Which of these technologies and skills will you use? Let’s look at some options.



## *Virtual Tours*

Slide 44

Virtual tours often create three-dimensional computer renderings of model apartment. Prospective residents can turn around and get a full panoramic view, even look out of windows. This can look almost like computer game images. There are third-party that can help design these tours. They are made even easier to build with the management team taking pictures on their phones. They are generally self-guided and can reside on your website or other social media sites.

### *Personalized Live Virtual Tours*

Here you can show an apartment home and talk with customers in real time using video chat on a tablet, smartphone or even a laptop with a built-in camera. Apps like Skype, Google Hangout, Apple FaceTime and WebEx or GotoMeeting are easy to use. These tours are scheduled just like you would an in-person tour. The fact that they are live means you have to practice.

- **Test your hardware whether using a laptop, phone or tablet.** Consider working with a colleague to make sure you have a strong signal and can navigate in the app.
- **Practice walking your tour and recording.** Give the tour as if someone is watching. Review the results and adjust. Be intentional, plan your route, practice your personality. Always shoot in vertical mode since 96% of data consumed on devices is vertical. Turn the camera around to introduce yourself or do introductions reversed off the mirror in the bathroom. Walk and speak more slowly than you normally would.
- **Set the scene.** Turn on lights, open blinds, close toilet lids (sound familiar?). Open doors so you don't have to on tour. Check the community tour route too.
- **While on the tour, remember this is about relationship-building.** Ask questions, engage the customer more than you would face-to-face. Find ways to ask for their feedback frequently. Leave each room or area with a question confirming their satisfaction. End with the camera on you so you personalize the invitation to lease.
- **Be ready to show a model, if available and an actual apartment home, if available.** This was important in surveys.

### *Personalized Recorded Video Tours*

These tours are just like the live tours, but they are recorded for one individualized presentation for one person and then sent electronically. Personalized recorded tours work well if the prospective resident cannot meet in real time or if he or she just

wants to see a specific part of the apartment. These can be easily recorded using a smartphone or tablet. Take the time to personalize the tour, speak to the camera and use his or her name. Be specific about relating to what your prospective resident said he or she wanted or needed; this should not be generic.

### ***Recorded Video Tours***

While prospective residents indicated they least favored a recorded tour, consider a library of recorded tours to complement a personalized tour. These can also be posted on your website, YouTube, or other social media outlets you use. Build the library and include quick looks at:

- Apartment Homes
- Amenities
- Community Exterior and Grounds
- Surrounding Neighborhood

### ***Website Demonstration***

Two options exist for using your website. First, with no connection other than a phone call, you can verbally demonstrate your website by talking the prospective resident through your photo gallery and floorplans while both of you are on the website, but not connected. Second, you could use screen sharing and walk through the website with the customer, narrating and asking questions throughout the demonstration.

### ***Website Video Chat***

Many industry partners are offering the ability to press a button on a webpage and start a video chat with a leasing professional. It's a virtual phone ringing – but with video capability. Needless to say, this feature requires you to be ready. Live chat with screen sharing gives you the ability to teach, tailor and take control. You'll need an app for video conferencing. Some popular choices include WebEx, Google Hangout, GoToMeeting, Skype and Zoom. With website video chat, you can answer questions and concerns in the moment and provide the prospective resident with a point of reference they can return to later. This option is even more powerful if you can demonstrate the ease of applying online.

### ***Virtual Staging***

In all the above options, showing a vacant apartment, whether recorded or in real time, is not that appealing to many. Some owner managers have abandoned models due to demand and have been looking for a way to add the warmth of a home to an empty apartment. Virtual staging allows you to add virtual furniture, accessories, even wall colors to your digital photos or 360-degree virtual tour. From DIY to full-service, your vacant apartment can come to life. Add the recorded staged tour to your website or send a link directly to your prospective resident.

## Self-Guided Tours

Self-guided touring is a model from the realtor's world. Customers let themselves into a home for a period of time, listen to a recorded or live tour and then leave the home. Industry partners are now able to assist in "showing" apartments - models and vacants - remotely and securely. Typically, a prospective resident signs up online to tour an apartment. They can choose a self-guided tour, download a provider's app and submit an image of a photo ID and credit card number for ID verification. At the appointment time, electronic locks let them into the apartment. The geo-location on the prospective resident's phone tracks their location as they move about the apartment and tour the property amenities. Their location can trigger a recorded presentation down to the room they are entering. Technology can now allow a live presentation through the tour as well.



Slide 45-49

### ACTIVITY



Let's look at four videos:

- a generic recorded video tour
- a recorded tour with subtitles and no voice over
- a recorded tour of a model
- a personalized video tour

*Note: Divide the class into 3-6 participants. Ask them to write down their impressions from the videos. When all videos are shown, gather and discuss findings. Remind students these are alternatives; there is no right or wrong method, but all of these attributes come into play.*

**Review each video and discuss your impressions. Consider the following:**

- Voice Quality
- Voice Tone
- Speed of Videotaping
- Video Resolution
- Audio Quality
- Energy of Agent
- Clear Start and End
- Personalization
- Panning vs. Stop and Hold
- Closing Attempts
- Agent Introduced
- Interested or Pass?

### Recorded Video Tours

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### Recorded Tour with Subtitles

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### Recorded Tour of a Model

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### Personalized Video Tour

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## SUMMARY

Remember that at the heart of any virtual leasing is the same sales expertise you have used before - identifying prospective resident wants and needs, building a relationship, connecting with emotional appeal, building value, closing by asking for the lease and following up. Especially important in the virtual world is ensuring the prospective resident knows what happens next. Have a plan for next steps for both of you.

# MANAGING OBJECTIONS



## *Introduction*

Slide 51

Almost everyone can find something to object to in an apartment community or apartment home. Perhaps the location is just not right, the lighting is wrong, the price is too high...there's always a potential objection or concern. A successful Leasing Professional recognizes these objections as opportunities to close more effectively. Next, we'll cover the most common objections and how to manage them.

## *Objections*

There are five general categories of objections: Private, Price, Place, Prejudice and Procrastination. On the following pages, we'll cover each of these and how best to respond to them.



## *The Private Objection*

Slide 52

A private or hidden objection is something a Leasing Professional needs to “sense”—it's not explicitly stated by the prospect. Because the prospect doesn't say it, it may be difficult for the Leasing Professional to identify.

If you sense that a prospect is hesitating due to a private objection, a good technique is to summarize the benefits and features of your community again to see if you have overlooked anything or can elicit the specific objection.

Other strategies include asking the prospective resident one of the following questions:

- “May I ask why are you hesitating?”
- “Was there something about the apartment you did not like?”
- “What more can I do to help with your decision?”
- “Are there any concerns or issues that I've failed to address?”
- “Tell me about that.”
- “Have you seen anything you like better?”

Summarize the features and benefits that the prospective resident already recognizes as reasons to choose this apartment home and community and ask, “What additional information or clarifications may I provide?”



Slide 53

## ***The Price Objection***

It's natural for some of us to want more than we can afford. A price objection may also be a private or hidden objection because the prospective resident does not want to admit this. You may be able to resolve this objection by re-emphasizing the value of living in your apartment community. You can enhance an apartment home's value by reviewing the features and benefits that make it worth the price for this particular prospect. When quoting rents, be sure you are informed of any pricing adjustments based on variety in terms of leases – a longer lease may be cheaper per month.

Sometimes the price really is out of the prospective resident's reach. Remember that the cost of the apartment home is just a component of other expenses the prospective resident has in a typical month. Consider if the prospective resident will be able to save money in other ways, such as a shorter drive to work, or because the resident would no longer need to join a private club for pool or fitness use.

When a prospective resident states that the rent is too high, you might respectfully ask How close are we? In order to establish the dollar and value amount that must be discussed. Or discuss what the prospective resident has budgeted for housing so you can fully understand their desired rent, utilities and expenses. Often the price objection is simply another way the prospective resident is asking you to build value in the purchase.



Slide 54

## ***Automated Revenue Pricing***

If your community uses an automated revenue pricing model, you may have little control over pricing. It will be important that you can explain to the prospect how prices are set, keeping the explanation short and on point. The prospect may have pricing options in selecting different apartment types or lease terms. Since these systems re-price apartments each day, there is a built-in sense of urgency to lease the apartment today—when the price is known. However, if the price objection involves other issues—perhaps still private—your explanation of automated pricing may have little impact. Offer the pricing options and continue to probe for understanding the objection.



## ACTIVITY

### Slide 55-56 *Price Objection with Amanda*



What is Gina's immediate response to Amanda's expressed concern about the price?

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*Best Answers Include:*

- *She asks what Amanda's price range is. In this way, she can find out how close she is to Amanda's budget.*

Discuss the two cost-cutting suggestions Gina gives Amanda. Are these good suggestions? Why or why not?

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*Best Answers Include:*

- *Gina indicates that the on-site fitness center could save Amanda a \$50 monthly gym membership.*
- *Gina suggests that the apartments are energy-efficient and could save another \$15-\$20 a month.*
- *Amanda seems to agree this would solve the problem, but Gina should be careful that Amanda does not assume she will actually realize those savings. Estimates or ranges might be better.*

How does Gina respond when Amanda says she needs to talk to her roommate before making a decision?

---

*Best Answers Include:*

- *Gina immediately offers a virtual tour and the use of a conference room if the roommates want to have a private conversation. In this way, Gina hopes to keep Amanda at the property and encourage a deposit and application.*

At the end of the video clip, what does Gina do that shows she understands the importance of her role as a leasing professional?

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*Best Answers Include:*

- *She asks Amanda directly to complete an application and leave a deposit so that the apartment can be taken off the market.*



### ***The Place Objection***

Slide 57

Factors such as work location, shopping, school and recreation make some locations preferable to others for different prospective residents. A “location” is always relative for the prospective resident and their lifestyle. You can’t move your apartment community, but you can prepare for this objection in advance!

Make sure your presentation lists the benefits of the existing location. Personalize the benefits for each prospective resident. Few locations will satisfy all the needs of all prospective residents. Ensure that you have correctly understood the objection – is it the apartment community itself or just the location of the particular unit in the community?

The better you know the needs and wants of your prospective residents, the easier it will be to manage a “place” objection. For example, a prospective resident may mention that the apartment community is too close to the shopping center next door. You can turn this into a positive by stating that a lot of the residents enjoy the conveniences associated with being close to the shopping center and the short drive to pick up last-minute grocery items. When a prospective resident states that a location is not desirable, you should ask questions to uncover the person’s specific concerns about location. This way, you can craft an appropriate objection recovery statement to address the concern.



### ***The Prejudice Objection***

Slide 58

A prejudice objection reflects a person’s preferences for specific features that are not available in the apartment home and/or community. Many of these objections can be anticipated. By composing a list of possible or previously stated objections, you can prepare for and anticipate objections that may arise and be ready to deal with them directly.

For example, a Leasing Professional could acknowledge the small square footage of a kitchen by stating, “This is our step saver kitchen.” You might note that space saved in the kitchen was used to make a larger living area where space was more important and add that a compact kitchen means less cleaning time. You might also suggest ways to store infrequently used kitchen utensils or the addition of shelving in a pantry to keep the space tidy.



## ACTIVITY

Slide 59-60

### Gina Addresses Jeff's Objections



What does Gina say to find out if Jeff likes the apartment? What is Gina trying to discover?

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*Possible Answers Include:*

- Gina asks Jeff, "What do you think about the apartment?"
- When he says it is ok, she probes more to find out if there is anything stopping him from leasing it.
- She asks, "Is there anything you don't like about the apartment?"
- Gina looks for an objection so that she can address it.

Jeff's objection is which of the five kinds?

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*Best Answer: Prejudice*

How does Gina address Jeff's objection?

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*Possible Answers Include:*

- She asks what kind of furniture he has and specifically uses the language "let's think about this" in order to partner on a solution with Jeff.



Slide 61

### The Procrastination Objection

This objection is less a result of the apartment home and community and more a result of the prospective resident's state of mind. The objection is that "I'm not ready to make a decision at this time." Or, sometimes, there's a hidden objection that you have to uncover: that someone else is involved in the decision, too.

Acknowledge the procrastination and ask if there is any additional information you can provide or questions you can answer. Bear in mind, the prospective resident may need to speak with another decision maker and that is the real reason for the delay.

If your inventory of apartment homes is low, one way to handle the procrastination objection is to create a sense of urgency. Remind the prospective resident of limited availability of this type of apartment home and how the prospective residents may lose out on a home that meets their needs and wants. Be honest – don't misrepresent lack of availability if it's not true! Try to discover when the prospective resident would be ready to make a decision and schedule a follow-up appointment.



## **How to Manage Objections**

Slide 62

The keys to managing objections are to anticipate the ones you hear frequently and to have alternatives available.

There's a three-step process that can help you manage objections:

- Admit It.
- Explain It.
- Resolve It.

The most important skill in managing objections is asking questions. You cannot begin to manage an issue if you are not aware of what it truly is. Ask questions!



## **Admit It**

Slide 63

Even if the prospective resident has misinterpreted something, or the Leasing Professional has misspoken, the prospective resident's objection is valid, at least to him or her. As a Leasing Professional, you should admit that the objection is true and agree with the prospective resident.

Then, build on this agreement by either correcting the misinterpretation of information or pointing out the advantages of living in your apartment home and community.

Try to anticipate an obvious objection and deal with it in the feature-benefit-emotional appeal sequence. Seek agreement and never argue with the prospective resident.

If you have a known floorplan issue, consider setting up a model depicting the issue in a different light - for example, a small bedroom could be shown as an office or a playroom. A small closet could be outfitted with extra shelving.

An example may be: "This kitchen is too small." Your response could be "The kitchen is small. When we designed the step-saver kitchen, we used the extra square footage in the bathroom. Let's talk about some ways we might be able to manage storage here to give you the room that you need."



## **Explain It**

Slide 64

Prospective residents will disagree with each other about features. One might like the location of the main bedroom and bath being connected, another might not. The successful Leasing Professional puts each objection in a positive perspective.

For example, if the feature is a main bedroom and bath being connected, then the benefit is convenience at night. Or, reverse the process for the prospective resident that sees it as just the opposite. When the feature is the bathroom across the hall from the main bedroom, the benefit is that guests do not have to pass through the bedroom to reach the bathroom facilities. Sell what you have in a creative way!

Finding the positives or the advantages requires advanced thought and planning by the Leasing Professional. It's best to prepare for possible objections by listing the advantages of each proposed negative. A skilled Leasing Professional accentuates the positive and minimizes the negative.



## **Resolve It**

Slide 65

There are two approaches to resolving an objection. One is the boomerang, in which you resolve the objection by turning a negative into a positive. For example, if the trash center is located close to the apartment home and detracts from the overall appearance, point out that it is convenient in bad weather since fewer steps are required for a resident to dispose of his or her trash.

A second technique to resolving an objection is to use sincere empathy to identify with the prospective resident's situation or feelings. Empathizing with the prospective resident on how they feel shows that you care and are listening to the prospective resident's needs and wants.

Empathetic statements usually begin with "I can see why you are feeling..." Then, you could explain to them that they are not the only ones who object to a specific concern. Continue to resolve the objection by using the **Feel/Felt/Found** technique:

- Acknowledge their concern by expressing that you understand how they feel.
- State that others who have leased at your community originally felt the same way.
- Describe (in the style of a testimonial from a satisfied customer) how these satisfied residents eventually found that their concerns were resolved and they moved in.

For example: “I can see why you are concerned about the storage space and feel that it would be difficult to store your belongings. Others have felt the same way. That is why we make our service team members available to install additional shelves when needed. Residents have found that these ‘extra’ shelves solved their storage issues.”

By resolving the objection with a straightforward approach, you are building trust and providing solutions for the prospect. A word of caution to not overly minimize the prospective resident’s concern by talking about what others have done. The concern is valid for them – you are simply offering alternative perspectives to help address the concern.

### ***Summary***

Everyone has objections—even the perfect apartment home for a prospect may not seem perfect at first! In this section, we’ve covered ways that you can manage objections.



## ACTIVITY



Your instructor will show five video scenarios. Work with your assigned group to answer the questions. You may wish to take notes using the lines below.

*Divide the class into five small groups or couples. Assign each group one video to resolve. Play the videos. Give several minutes for the group to agree on an answer. Let them reply, discuss and then move to the next video.*



### **Question 1 of 5: It's All About the View**

In the clip you just watched, what should Alexis say next?

Select from the following choices:

- Choice 1:** We have a great mix of families, singles, students and retirees.
- Choice 2:** It's a nice community of neighbors, I'm sure you'll be comfortable here.
- Choice 3:** Let me direct you to a website with all of the demographic information for our area.

*The Explanation:*

*Choice 2 answers the question, does not identify any protected class and provides another chance to sell the community. Choice 1 violates fair housing law and choice 3 is dismissive and does not answer Alexis's question specifically about the property.*



### **Question 2 of 5: Building Rapport**

In the clip you just watched, what could Samantha have done better?

Select all that apply from the following choices:

- Choice 1:** She could have asked the caller for his name earlier in the conversation.
- Choice 2:** She could have asked open-ended questions to understand the caller's needs and preferences.

- ✓ **Choice 3:** She could have provided more information about the benefits of the apartment after mentioning that she had three studio apartments available.
- ✗ **Choice 4:** She could have persuaded the prospective resident by listing all of the unique selling points of The Bridge Tower compared to its neighboring competitors.
- ✓ **Choice 5:** She could have elaborated on all the apartment features and community amenities before asking about a price range.

*The Explanation:*

*The initial conversation creates a strong first impression about you and your apartment community to a prospective resident. Asking for the caller's name after identifying yourself establishes a personal relationship. Also, Samantha, the Leasing Professional, could have better engaged the caller by determining his needs, interests and preferences. Based on the information, Samantha could have strategically elaborated on relevant details to the prospective resident*



### **Question 3 of 5: Three-Bedroom Available?**

In the clip you just watched, how should Mark respond?

Select from the following choices:

- ✗ **Choice 1:** We are proud to say that our 28-story building has 425 apartments, of which 150 apartments are three-bedrooms! The price range for this apartment starts at \$3,000. We will show the model homes tomorrow from 9am to 6pm. I am EXCITED to see you soon!
- ✓ **Choice 2:** Yes, we will have some three-bedroom apartments available next month. The price range starts at \$3,000 depending on the size of the apartment. When are you available to come in for a tour tomorrow? Also, what are the three most important features you are looking for in your new apartment?
- ✗ **Choice 3:** Yes, we will have your three-bedroom apartment available next month. The price starts at \$3,000 depending on the size. The three-bedroom apartment showing will be from 9am to 6pm tomorrow.

*The Explanation:*

*Choice 1 and 3 do not offer specific opportunities for a tour. Remember that your response to an email should not only be clear and professional, but an ongoing thread of dialogue with the prospective resident. Avoid using emoticons and all capital letters in business correspondence. Your message should clearly respond to the original questions to avoid misunderstandings and miscommunications. It's also critical to set a specific appointment time—not just tell the prospect your hours—in order for the prospect to truly commit to coming to the property.*

*Ending the response with a follow-up question about the prospect's preferences, interests and needs can naturally continue the discussion. Since this interaction is via email, you need to respond to the prospect's specific questions as much as possible, while starting to build a relationship via open-ended questions.*



Slide 72-73



#### **Question 4 of 5: Effective Closing**

In the clip you just watched, what should Vanessa do next?

Select from the following choices:

- ✘ Choice 1:** Persuade them by emphasizing the limited availability of apartment homes and the large number of other interested prospective residents.
- ✔ Choice 2:** Restate the benefits of the apartment community and apartment homes, linking them to Linda and Brian's needs and wants.
- ✘ Choice 3:** Tell Linda and Brian that they need to commit to the apartment, and make a deposit, now, otherwise the apartment may not be available.

*The Explanation:*

*Once Vanessa returns to the Leasing Center with Linda and Brian, she should re-emphasize her solutions to their needs and wants. It's essential to summarize the benefits of the apartment homes that are prospect-oriented rather than product-oriented. Once Vanessa has done this, she can take one more step to close the deal—but if she tries to finalize the deal too quickly, she may be perceived as being too aggressive or pushy.*



### **Question 5 of 5: Objections**

In the clip you just watched, how should Vanessa apply conflict resolution to overcome Linda and Brian's concern? She knows that there is little traffic after rush hour and almost no pedestrians walking by.

#### **Admit**

Vanessa should admit that she understands why noise may be a concern for Linda and Brian.

#### **Explain**

Next, Vanessa should explain that others have also felt the concern that Linda and Brian have—other light sleepers have lived in the apartment they're considering—and that when they moved in, they found that noise was not a problem at night at all. There's little traffic after rush hour, and almost no pedestrians walking by.

#### **Resolve**

Finally, Vanessa should resolve the issue by noting that based on others' experience, Linda and Brian have nothing to worry about.

## *Summary*

You've now seen the key behaviors of a successful Leasing Professional during the sales process. Think about how you've been working through your sales process with prospective residents and reflect on ways to improve your performance by applying relationship-building skills.



Slide 76-77

## Module 3 - The Transition from Prospect to Resident

### *Transitioning from a Prospect to a Resident*

Once a prospect makes a verbal commitment to lease, the next phase is to assist in a smooth transition into becoming a resident. The key transition phases are:

1. The Application Process.
2. The Lease Process.
3. The Move-in Process.

### *The Application Process*

There are several steps involved in the application process: completing the application, verifying the application and, on occasion, rejecting an application. Each of these steps are heavily influenced by local, state and federal laws. There is additional information in the NALP Course on Relevant Laws.



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### *Completing the Application*

Completing the rental application requires patience, attention to detail and accuracy. Here's what you need to be aware of when asking a prospective resident to complete an application:

- **Patience:** Prospective residents may experience stress and discomfort while completing the paperwork. You can improve the situation—making it more comfortable for the prospective resident— by maintaining a friendly demeanor, avoiding the tendency to rush and standing by to answer questions and encourage.
- **Attention to Detail:** Show extra care to all details filled out by the applicant for completion and (if the application is filled out manually) to its legibility. You can guide the applicant to complete the form so long as it is within state and local laws for you to assist.
- **Accuracy:** Checking for accurate information on the application is a necessary step to qualify the prospective resident and be sure that the person appears to have the financial resources to rent the apartment. Accuracy issues may delay the person's approval or move-in and in some cases, may lead to the prospect living elsewhere.

As a general rule, it is recommended that prospects complete the rental application and then review it together with you, rather than completing it with you. If there is a mistake made on the application, you will not be held accountable for any misinformation provided by the applicant.



Slide 79

### ***Verifying an Application***

After an application has been signed by all parties and the appropriate monies have been collected, the verification of the applicant takes place. Many management companies hire a third-party company specializing in this service to conduct an investigation and verification of the application. Nonetheless, you should understand your property's verification form and process so you can keep the applicant informed of the progress. Please note there is more detail about the verification process in the CALP Course on Relevant Laws.



Slide 80

### ***Denying an Application***

While you should review the information on the application, the prospect has the ultimate responsibility for the accuracy of the information. Inaccurate or missing information can be the cause of application denial. If an application is denied by the findings of the reporting companies, your role as a Leasing Professional is to make the applicant aware of the decision by sending a written notice to the prospect. The applicant should be made aware that the owner has set the criteria levels, but it is the finding of the CRA that was used in the decision.

You are not expected to be—and should not be—involved in correcting any problem on the report nor will you be provided with the details of the rejection. Instead, provide the contact information of the agency that made the decision and encourage the prospect to call and obtain more details directly. Remember from “Relevant Laws and How to Apply Them” that an adverse action notice must be sent to the applicant.



Slide 81

### ***The Lease Process***

A lease agreement is a contract whereby the owner of a property permits the resident to use that property for a period of time in return for a rental payment.

As a practical matter, most owners and managers require a written and signed lease document. A lease that is for more than one year is generally legally required to be in writing and is signed by both parties. Major terms of a lease include:

1. The apartment address.
2. The apartment number.
3. The rent.

4. The frequency with which rent payments must be made (usually monthly) and due dates.
5. The lease term.

The lease agreement is covered in detail in the CALP Course on Relevant Laws.



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### ***Avoiding Potential Lease Problems***

Here are some steps to follow in order to avoid problems with leases:

1. Identify all residents of each apartment and their ages, in order to prevent disputes about who is a resident and who is a guest.
2. In the lease, describe how keys, gate openers and access cards will be delivered to the resident.
3. Broaden the definition of “foreseeable harm” in the lease to avoid potential misrepresentations of the safety and security of the apartment community and home.
4. Identify the required method by which one party should notify the other, usually in writing and delivered by certified mail.
5. Include a way to document the resident’s acceptance of the premises and confirmation of its good condition upon move-in. Also, state a specific, limited time period in which the resident could submit a list of problems after move-in.
6. Document the resident’s acknowledgement of the presence of smoke or carbon monoxide detection devices at the time of initial occupancy, including a statement that they were tested, their operation was explained and they operated properly. Also, the resident should be obligated to test the smoke detector at least once a week and to inform the owner in writing of any malfunction.
7. Explain the purpose of frequent routine inspections.

As you learned previously, a lease review such as the NAA Lease Review Video and a separate lease-signing meeting help the new resident understand the terms of the documents he or she is signing.



Slide 83

## ***The Move-in Process***

Once the application has been approved and the applicant notified of approval—your attention should turn to making everything ready for your new resident. We all have experienced how painful and hectic moving can get. It seems that all of the mayhem tends to fall on move-in day, so this can be that make-or-break opportunity for you to create some great first impression moments for the new residents. You can pull off the magic by being thoroughly prepared in the following ways:

1. Use a **resident processing checklist**.
2. Write a **welcome letter**.
3. Prepare a **move-in packet**.
4. Check the **readiness of the apartment**.



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## ***Use a Resident Processing Checklist***

Using a Resident Processing Checklist can tremendously reduce mistakes and risks of omitting any important preparation steps. This simple tool will help you appear prepared and professional to the new resident.

A resident processing checklist helps you track all steps from the time a deposit is placed until the move-in is complete. This will typically include items—with dates and other relevant information—such as:

- Deposit monies that have been received (how much and when?).
- Application(s) that have been completed (when?).
- Application(s) that have been verified (when?).
- Amenities/ancillary items discussed with this resident (e.g., leasing a washer/dryer).
- Lease generated (when?).
- Lease signed (when?).
- Move-in appointment scheduled (when?).
- Move-in inspection scheduled/completed (when?).
- Welcome packet created along with other items, depending on your community.



Slide 85

### ***Write a Welcome Letter***

Provide the new resident with a personalized Welcome Letter that develops a warm atmosphere surrounding the new apartment home and community. Place the letter at the entrance of the apartment home where it can be easily spotted. The letter can offer suggestions for the new resident for getting acclimated and connected to the new home or just a couple of welcoming sentences.

When you write your welcome note be sure to:

- Put it on notecard stock.
- Hand write it.
- Check for spelling and grammatical errors.



Slide 86

### ***Prepare a Move-in Packet***

The move-in packet is a practical and important way to demonstrate your thoughtful preparation for a smooth move-in experience. On average, 1 out of 16 new residents has to wait for his or her apartment home keys and lease documents upon arrival on the move-in day. That number is much too high, it should be 0 out of 16!

Be prepared and be ready to welcome the new resident by compiling a helpful move-in packet. The move-in packet may include the following:

- Copies of all signed documents.
- A current community newsletter.
- Special coupons from local businesses.
- An area map.
- Public transportation schedules and routes.
- Nearby school information.
- Emergency phone numbers.
- Guidelines for proper operation of appliances.
- A resident handbook.



Slide 87

## ***Confirm that the Apartment is Ready for Move-in***

In order to meet resident expectations, you'll need to ensure that the apartment is truly ready for move-in. Cleanliness is one common problem. According to a 2017 SatisFacts Insite survey, 12% of new residents state that their new home was not properly cleaned. Additionally, an astounding 21% said that either appliances or fixtures were not working properly. Paying attention to details can help you achieve great impressions and reviews. New residents expect that all the appliances, equipment and fixtures have been properly inspected before they move in. You should set a time to properly test and understand each appliance by learning how to operate it yourself and explain the operation to the new residents.

To be sure the apartment is move-in ready, create a checklist of everything you'll need to confirm: the apartment is clean, all appliances are in working order, no problems with paint chipping, all fixtures work, etc.

On move-in day, you should be the first one in the apartment, early in the day, running through a "practice" move-in. Use the move-in inventory form, you will actually fill in later with the resident, as a guide to include everything. The best surprise is no surprise.

It is all about coming up with solutions to minimize stress and chores for the new residents.

### ***Summary***

The sales process doesn't end with a verbal agreement from the prospect to lease an apartment—in fact, far from it! In this section, we covered how to make sure your prospective residents are approved and have a smooth transition from "prospect" to "long-term resident."



## ACTIVITY



For each question in this activity, your instructor will show you a video showing Ryan, the Leasing Professional for an apartment community, as he assists a prospective resident transitioning to becoming a new resident. You may wish to take notes on the lines below.

*Divide the class into five small groups or partners. Assign each group a video to review. Play each video and have the assigned group provide their answers and reasons. Discuss with the class and then move to the next video.*



### **Question 1 of 5: Nothing is Guaranteed**

In the clip you just watched, what did Ryan do well, and not so well?

---

*The best answer is:*

#### **On the good side:**

*Ryan was careful to refrain from making enthusiastic promises on which he may not be able to deliver. Making assurances to prospective residents may become binding and misleading if they rely on them when deciding to rent.*

#### **Areas for improvement:**

*He could have shown more emotional support and proposed suggestions to ease the stress. For example, he could have reduced their discomfort by offering guidance in completing the application form and reviewing it with them for accuracy to avoid any mistakes and delays of the process.*



### **Question 2 of 5: Helpful Email?**

Which information should Ryan include in his email?

From the list below, should each of these be included in his pre-move-in email? Answer “Yes” or “No” for each.

#### **Candidate Items**

- Special move-in parking arrangements  
 YES  NO
- Explanation of the operation of their new appliances  
 YES  NO

- 24-hour emergency contact  
 YES  NO
- Information about the neighborhood  
 YES  NO
- Explanation to plan enough time for a move-in orientation  
 YES  NO
- Information about the apartment community  
 YES  NO
- Move-in hours and regulations  
 YES  NO
- Instructions to pick up keys and signed lease  
 YES  NO
- Move-In Condition Notification Form  
 YES  NO

*The items our experts chose were all things that Jason and Megan needed to know before they moved in. In order to not overwhelm them with too much information—particularly with information that would not be useful during the move-in process—the recommendation was to include only some items. Something like information about their new appliances, for example, would be better provided in the move-in packet rather than in advance, before they have access to the appliances.*



### **Question 3 of 5: The Personal Touch**

What should Ryan include in the information packet?

Select one that provides the best information packet for Jason and Megan:

#### **✘ Packet 1:**

- Copies of all signed documents.
- An area map.
- Public transportation schedules.
- Location and information on schools in the area.
- Location and information on places of worship in the area.
- Location and information on parks.
- Special coupons from local restaurants.

## **✘ Packet 2:**

- Copies of all signed documents.
- An area map.
- Location and information on bars and clubs.
- Location and information on hotels.
- Special coupons from local restaurants.
- Information on concerts and upcoming events.

## **✔ Packet 3:**

- Copies of all signed documents.
- An area map.
- Transportation route and directions from Clairborne Court Apartment to Star Capital Bank.
- Location and information on nearby pre-kindergarten schools.
- Location and information on nearby dog parks.
- Information on outdoor activities and upcoming marathon races.

*The best answer is:*

*A personalized move-in information packet is a great way to pleasantly surprise new residents and show that you care and remember your conversations with them. It's going the extra mile to make the packet personal to the specific residents. Packet 1 includes items that are typical and generic to all and any residents, but it does not offer a customized touch to the specific resident. Packet 2 includes items that are irrelevant to the interests of Jason and his family. Packet 3 is nicely tailored to Jason and Megan's interests and needs. Taking a few extra minutes to print out a map with directions from their new home to their place of employment and adding in details that satisfies their interest and needs will result in an increased customer satisfaction. It is the little things you remember that matters and influences the lives of people.*

*Remember to make every basic move-in packet the same - to comply with fair housing rules. If you have specific information about your new residents, feel free to go that extra mile - but ensure these are additions and are not discriminatory. Be inclusive, not exclusive.*



### Question 4 of 5: The Big Move-In

In the clip you just watched, what did Ryan do well, and not so well?

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*The best answer is:*

#### **On the good side:**

*Ryan demonstrated professionalism by checking in on Jason earlier in the morning of the move-in day. A simple phone call to check in or offer assistance can show the new resident that you care and that you are available. Ryan did well when he followed-up on Jason by calling him again.*

#### **Areas for improvement:**

*When Jason arrived two hours later than the expected time, he could have focused on the most important details rather than trying to explain everything. Ryan jumped straight into discussing business even though it was clear Jason had a pretty rough day and was distraught. Ryan did not give enough space for Jason to explain his situation. Even worse, he cut him off by interrupting him and without listening to what he had to say. It was not pleasant for Jason for the lease addenda to be explained A through K for an hour.*

*He could have shown more empathy by connecting with him at a human level.*

*Ryan could have mutually arranged a time with Jason to offer a pre-move-in appointment with the new resident to give enough time to thoroughly explain the lease so that there are clear understandings and expectations on each side. This also shows the resident that you care enough to keep in mind the stress of moving day right from the start.*



### **Question 5 of 5: A Busy Day**

In the clip you just watched, what did Ryan do well and not so well?

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*The best answer is:*

*Ryan really handled this situation poorly.*

*There are days when phones ring off the hook, online inquiries flood in and prospective residents need attention in the office. You could easily feel overwhelmed by the amount of work you have to manage at hand. A good Leasing Professional knows how to leverage his or her prioritization skills.*

*Some things need immediate attention, while others are less important. In this situation, the first impression Ryan is giving to Jason and Megan of their new home is not a good one—Ryan's attitude is impersonal and unconcerned. Simply handing the form lacks a personal touch. By doing so, Ryan also misses the opportunity to demonstrate excellent customer service. It does not take a long time to assist the new residents in the inspection and it would have been time well spent.*

*He forgot to take care of her Big Rocks and let the little green rocks make more noise!*

### **Summary**

In this module, we covered the transition from prospect to resident. In order to ensure a smooth transition and a happy resident, there's a lot you need to do as a Leasing Professional!



## Module 4 - How Well Are You Doing?

Slide 99-100

### *Your Sales Persona*

Throughout this course, you've learned that a practical way to succeed in your sales process and relationship building is to authentically listen to and understand your prospective and current residents. This means you should demonstrate openness, curiosity and a willingness to learn about your customers and how you can help to smooth a prospect's transition to being a new resident.

The service you provide to your prospective and current residents is crucial to your business success. Remember, it is not only pre-sales discussions that matter, but after-sales service--through the transition to being a resident--that makes your community stand out from your competitors. Impress and go the extra mile for your prospective and current residents.



Slide 101

### *Tracking Your Success*

To measure your performance as a Leasing Professional, establish regular checkpoints to review your progress in relation to the goals of your company. If you identify any areas where you can improve, this is a great opportunity to modify and revise your behavior as necessary.

Also, it is common for prospective and current residents to rely on social media and online blogs which offer transparent reviews and ratings about the reputation of your apartment community. Checking these sites is a great way for you to evaluate how well you are doing and what areas you can improve on. Lastly, how you respond to the reviews (if responding is part of your role at your community)—both negative and positive—can demonstrate your professionalism and commitment to your apartment community.



Slide 102

## ACTIVITY: HOW WELL ARE YOU DOING?

Now, you'll get the chance to think about your leasing experiences and rate yourself on key criteria. After you've reflected on your performance, you'll make a list of areas that you want to work on.

### *How Well Do You Perform on a Daily Basis?*

Take a look at each area and assess yourself on your day-to-day performance. By working through the list, you will be able to take a fresh look at some of the areas that you can focus on to improve.

*Rate yourself from 1-5 (1= Never, 5= Always)*

	1	2	3	4	5
I greet all prospective and current residents in a positive way.					
I am quick to respond to the needs of prospective and current residents.					
I have a good knowledge of the community and our policies.					
I work effectively in difficult situations.					
I am tactful, patient and sincere.					
I dress and act professionally.					
I am good at managing my time.					
I am confident.					
I am flexible.					
I carry out necessary paperwork in an organized and timely manner.					
I care and try to understand about prospective and current residents' needs.					
I am good at communicating effectively both in writing and speaking.					
I make sure to go the extra mile when working with prospective and current residents.					
I pay attention to details.					
I know how to use technology to my advantage.					

## WHAT WOULD YOU LIKE TO IMPROVE?

Now that you have assessed your performance, think about the areas where you're not satisfied with your performance.

List those areas below and think of what specific changes you can make in order to improve, starting today! Write your thoughts on the lines below.

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*Give students a few minutes to jot down their personal key takeaways. Tell them you will look for volunteers to share their conclusions. Be encouraging that everyone's take-homes are personal!*

*Call for volunteers to share one area in which they are great at already and another they know they need to work on. If the class is smaller, plan to include everyone.*

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Slide 103

## Course Summary

You should now be able to:

- Get to know a prospect's needs.
- Match your property's features to the prospect's needs.
- Properly conduct a positive move-in experience.
- Support and meet the needs of future residents after the lease is signed, through transition to being a new resident.
- Evaluate your sales performance.

Your relationship selling skills make a critical difference in your personal success as a professional and in your property's success. As you have learned in this course, it is all about understanding the customer's point of view and how well you provide service to prospective and current residents.

At the end of the day, sales is all about the impression you have left on prospective and current residents with your sincerity, empathy, knowledge, professionalism and reliability.

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









**National Apartment Association Education Institute**

**4300 Wilson Boulevard, Suite 800**

**Arlington, VA 22203**

**833-86-MYNAA | [naahq.org](http://naahq.org)**



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