**CALP ILT - Program Schedule and Class Plan**

**Affiliate**

* Have a Zoom or GoToMeeting platform
* Prepare the roster
* Divide into work groups of 3-5 students
* Encourage group participation for prework
* Assist students with eBook download and saving/printing on device/laptop
* Administer series of emails
  + Send out invite to Orientation
  + After Orientation, send roster divided into work groups and syllabus. The link to the videos is in the syllabus and in the NAA Affiliate Instructor Resources.
  + Work with instructor to schedule optional review within in 1 week after the last class
  + After class send test eligibility code, program evaluation link or form and invite to the review

**Instructors**

* Be familiar with Zoom or similar learning platform
* Plan to use your computer camera – students may or may not
* Call throughout the session for prework as assigned – remind about prework each end of day
* Be sure students are familiar with chat function and ensure they have clicked the dropdown to “all panelists and attendees” so everyone can see all of the chats
* Manage the chat responses!
* Do not read slides – discuss concepts
* In the teaching notes, slides are indicated in parentheses **()**; text references are **“pp”**
* Page numbers in the Prework “boxes” in the Syllabus refer to the Participant Guide – pages in the Facilitator Guide may be different by 1 or 2 due to instructional notes
* Load Poll questions into Zoom BEFORE class
* Write the ASK, POLL and PREWORK cues in your own FG
* Rehearse!!! Timing is essential!
* Remind students that sessions are recorded

**Students**

* Have a computer with strong internet connectivity and audio/microphone
* Invest time for prework and off line group calls
* Consider printing text for use during each module
* Be able to use chat and polling responses
* Plan to take the test within 1 month of last class

**Proposed Course Schedule**

Approximately 3-4 hours per day

At least one day between sessions to accomplish calls and any prework

View videos online

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Day 1 | Hrs | Day 2 | Hrs | Day 3 | Hrs | Day 4 | Hrs |
| Program Orientation | 0.5 | 3-Competition Matters | 1.5 | 4-Relevant Laws - Other | 1.0 | 6-Resident Issues | 1.5 |
| 1-Bringing New Residents | 1.75 | 4-Relevant Laws – Fair Housing | 2.0 | 5-Sales Process | 2.5 | 7-Market Analysis | 2.0 |
| 2-Marketing & Maintaining | 1.25 |  |  |  |  |  |  |

Offer an optional 1-hour CALP Review Session within one week after the class.

**DAY ONE**

**Orientation, Courses 1 and 2**

**Program Orientation**

Welcome Students

Review Schedule for the week

Explain about using the platform

Chat box responses

Polls

Group Prework debrief

Discuss need to Register and Enroll

Demonstrate the NAA website

Show Candidate Resources tool

Evaluate the program at the end

Optional Review session the week after class

Testing promptly within 1 month

**REMINDER – Slides are in (); Pages are pp**

**Course 1 – Bringing in New Residents – 67 slides – 1.75 hours**

PRE-CLASS PREWORK –1) Group – Review the team scenarios on p. 13. Choose one to answer in class; 2) Group – Watch “COPA Airlines” video slide 33; answer 4 questions in text pp. 14-15; 3) Group - watch “Big Rocks” video slide 40 and prepare answers to 3 questions in text pp 17-18; 4) Group – Complete the list on text p. 21, Groups 1 and 3 list 5 time-consumers and Groups 2 and 4 list 5 time-savers; 5) Group – Draft email response for one of the scenarios slide 62, p.29. Even groups do scenario 2; odd groups do scenario 1 or 3

Introduction (5) – ASK one of warm-up bullets, p3

Prospective Resident’s Point of View (7-10) – play the video (8), odd groups answer Q1; even groups answer Q2

Professionalism & Teamwork (11-38) – play the video (12), odd groups answer Q1; even groups answer Q2; teamwork discussion (15) p. 7; review professionalism (16-22) - ASK what tasks DON’T you do? p. 8-9; Image/Knowledge/Value/Goals; Teamwork; Debrief TEAM PREWORK (28-30) Show LP quiz video ASK Quiz about Leasing Professional Performance (31-32); Debrief COPA PREWORK (33-37)

Organization, Prioritization and Time Management (39-52) – Debrief Big Rocks PREWORK (41-43); Planning/Prioritizing/Time Management, pp 19-20; Debrief Time PREWORK (49) p 21; View video quiz, ASK what agent did well and what could have been better. P. 22 (52)

Using Your Technology – (53-67) – POLL p.23 which type of technology are they using; Apartment Searches/Reviews/Leads/Auto-Rev (55-58) p. 23-25; POLL p.25 are you using automated revenue? Review email/Texting/Portals (59-61), p. 26-28. Debrief Email PREWORK (62) p. 29; rate the LP video (63-64) p. 30; Virtual Leasing (65) pp 30-31, Summary (66) p 31-32.

**Course 2 – Marketing and Maintaining Your Community – 61 slides – 1.25 hours**

PRE-CLASS PREWORK – 1) Group - View video “Market Trust” slide 9, be prepared to discuss the answers to the four questions in text pp 4-5; 2) Group - Complete When Things go Wrong Activity, text p 9, answer each of the elements for your assigned situation - Group 1- a missed service request; Group 2-an amenity out of order; Group 3-a late notice in error; Group 4-a noisy neighbor complaint; Group 5 -a part is on order delaying service.

Introduction (5) - ASK one of warm-up bullets, p3

Your Brand and Reputation (7-24) – Debrief Market Trust PREWORK (7-13) p. 4-5; review Emotional Connections, ASK what makes you connect with a company p. 5, review Gina videos, answer questions on p 6; review Branding, Reputation, POLL (20) what do you do when a product or service you want/need is not available? Continue with Monitoring vs. Managing p. 7-8 (20-21); Debrief When Things go Wrong PREWORK (22-23) p. 9; summary (24)

Keeping Your Property Showable (25-47) – review “Blu Nest” video p 10-11, ASK what went well and what needed work); Review Keeping your Property Showable (29-41) p. 12-18, ASK how do you get maintenance to show personal curb appeal? Review LP tip p 19 and Interior/Exterior Activity p 19-20 (43-47)

Marketing your Property (48-61) – Joe’s Search video (48-50) p 21; review Outreach Marketing p 22-24 (51-56) POLL p 22 which types of advertising are you using; ASK what 2 online services are your most productive p 23 (54); Inbound Marketing leads p 24-25 (57-58); Glens River activity p 26 (59-60).

**DAY TWO**

**Courses 3 and 4-(Fair Housing only)**

**Course 3 – Why Your Competition Matters – 43 slides – 1.5 hours**

PRE-CLASS PREWORK –1) Group – each member phone shops a competitor and notes the 3 things that got your attention, p. 8 (20); 2) Group – each member Google searches their own property and notes the 3 things that impressed you – bad or good p. 8 (21); 3) Group – Complete the community comparable form for your property p. 15-16, meet to review differences; 3) Group - View “Trim Tab” video slide 34, be prepared to answer four text questions in class pp 17-18; 4) Indiv – List one thing you’d like to change at work and one idea about how you would make that change p. 19 (40-41)

Introduction (5) - ASK one of warm-up bullets, p3

Shopping your Competition (7-21) – Why and when to shop p 4; Shopping by phone and Gina Activity p 4-5 (9-11); Shop in person or online; POLL p 5 have you shopped via mystery or relationship-building? What to look for – 5 “P’s” p 5-7 (14-19) POLL p 19 Which of the 5 is most important? Debrief Phone and Google shop PREWORK p.8 (20-21);

The Market Survey (22-32) – Definition/Importance p 9-10 (22-25) ; LP tips p 25; Target Market/Market Segmentation p 10-11 (26-28); POLL p 10 Which factors most affect your target market? Review Market Survey Process p 11-12; Debrief Phone Shop/Comparable Community PREWORK p 12-16 (29-32).

Your Role in Improving Your Community (33-43) – Debrief Trim Tab PREWORK (35-38) p. 17-18. Review Change - Debrief Change PREWORK (50-51) p 19.

**Course 4 – Relevant Laws – Modules 1 and 2 only- 54 slides – 2.0 hours**

PRE-CLASS PREWORK – None

Introduction (5) - ASK one of warm-up bullets, p3

Fair Housing Laws and Prospective Residents (7-55) – view Leasing Appointment video (8-9) and questions p 4; Fair Housing Laws (10-15) Overview/Discrimination/ Details/Complaints p 5-7; LP Tip (16); review Prohibited Practices (17-18), pp 8-11; ASK for student experiences or questions for each; discuss two scenarios (19-23) pp 12-13; review Disabilities (24-25) pp 14-15 POLL Which do you receive more requests for - Accommodations or Modifications? Review prohibited/ accepted practices (26-28) p. 15-16; Make the Call (29-30) p 17; Review Testers (31-32) p18 POLL Have you had experience with testers? Avoiding Discrim (33) p. 18-19; Differences are OK (34) pp 20-21; Review ADA (36-37) pp. 22-23; Buzz me (38-39) p 23 POLL Has your property defended any ADA Complaints – physical or website?

Fair Housing Laws and Current Residents (41-54) - View Joe and animal (42-43) p 25; review Prohibited Practices (44-45) p 26; ASK for student experiences or questions for each; Harassing Owner (46-47) p 27; Review Prohibited Practices (48) p 28; ASK for student experiences or questions for each; Discuss 2 Disability scenarios (49-53) p 29

**DAY THREE**

**Course 4 – Leases and Contracts and Course 5**

**Courses 4 – Modules 3-4 and Course 5 – 1.0 hour**

PRE-CLASS PREWORK – 1) Indiv - View “The NAA Lease Overview” video slide 80. Be prepared to answer the three questions on text p 48.

Proper Screening of a Prospective Resident’s Qualifications (55-78) – review Screening (55-57) p 31-32 ASK what else do you screen for? POLL How is screening conducted at your property? Review Virtual Identity/ Criminal (58-59) p 32-33; POLL Has your property had identity fraud? ASK Which of the 4 identity frauds have you experienced? Credit and ECOA, FCRA, FACTA, FICO (60-64) pp 34-36; ASK Have you ever had someone say they never lived there but they are in collections? Rejecting Application (65) p 37; 5-Part Screening quiz ASK for answers by groups (66-67) p 38

Working with the Lease and Leasing Documents (79-86) – Debrief Lease PREWORK p 48; Review the three questions (81-82) p. 48; Review Lease and Leasing Documents (83) p. 49; Law of Contracts (89) p. 50; Landlord/Tenant Laws (85) p. 51

**Course 5 – The Sales Process and Building Relationships – 103 slides – 2.5 hours**

PRE-CLASS PREWORK – 1) Group – give an example of what you teach; how you tailor; and how you take control in a sales presentation text p 4; 2) Group – create two open-ended questions that are NOT in the text p6; 3) Group - View “Empathic Listening” video slide 21. Be prepared to answer the two questions on text p 10;

4) Group – Review the 5 types of objections pp.24-28. Select the one type that the group is most comfortable with. Be prepared to discuss; 5) Indiv - Complete the personal assessment on page 50 of text;

Introduction (5) - ASK one of warm-up bullets, p3

The Foundation of the Relationship Sales Process (7-24) – review Relationship- Based Selling (8); Debrief Teach-Tailor-Take Control Presentation PREWORK (8), p 4; Know Market/Prospects /Message/ Product (8-11) p4-6; Art of Questions (12) p.6 Debrief Questions PREWORK p 6; Qualifying Activity Video (13-14) p6-7; Listening/Distractions (15-16) p7-8; Personalized Selling (17) p8; Personalized Activity Video V(18-19) p8-9; Closing (20) p9; Debrief Empathic PREWORK (21-23) p10-11.

Applying the Relationship Sales Process (25-75) – Review Wolf River Video (25-27) p12; Relationship Sales Process-Needs (28-29) p13; Sales Activity Video (30-31) p14; Open/Closed Questions (32) p14; Presentation/Close (33-34) p15; Working with a Prospect (35-42) p16-18; After slide 42 POLLS – are you using texting? What types of tours are you using? Virtual Leasing (43-44) p19-22; 4 Leasing Tours Activity (45-49) p22-23; ASK Describe your experiences with these methods; Objections (51) p24; Private/Price (52-53) p24-25; Automated Pricing and Pricing Activity Video (54-56) p25-26; POLLS – Has automated revenue been a problem or not? Place/Prejudice (57-58) p26-27; Objection Activity Video (59-60) p28; Procrastination (61) p28; Debrief Objections PREWORK (61) p 28.

Managing Objections (62-65) p 29-31; view 5 scenarios and answer questions (66-75) p32-36.

The Transition from Prospect to Resident (76-98) – Transitioning (76-77) p37; Application Process (78-80) p37-38; The Lease Process (81-82) p38-39; The Move-In Process (83-87) p40-42; ASK Are you using move-in gifts? What kind? #82; Move-in Activity (88-98) p43-47.

How Well are you Doing? (99-101) – Ask for volunteers to share their scores rated 5. P 48-50.

**DAY FOUR**

**Courses 6 and 7**

**Course 6 – Meeting the Needs of Current Residents – 67 slides – 1.5 hours**

PRE-CLASS PREWORK –1) Group – give two examples of how you recognize and appreciate your maintenance team text p 12; 2) Indiv - View “The Ultimate Question” video slide 39. Calculate your Net Promoter Score on p 28, be ready to share in class; 3) Group – Answer the 3 renewal questions on p 29, be prepared to share in class. 4) Group – view “The Current Residents Point of View” video slide 61. Be prepared to give at least two likes and dislikes you heard text p38.

Introduction (5) - ASK one of warm-up bullets, p3

Handling Maintenance Issues (7-21) – review issues, groups answer (8-15) p4-8; Working with the Maintenance Team (16-21) p10-12; Debrief Appreciation PREWORK (20) p12;

Handling Issues and Incidents (22- 36) – 2 Scenarios Safety First and What’s that Odor? (24-28) p 13-19; review and answer 7 scenarios (29-36) p20-27.

Securing and Processing Lease Renewals (37-58)- Debrief NPS PREWORK (40)p29; POLL #12 what is your NPS? Debrief Renewal PREWORK (41) p30; Lease renewal mechanics (42-46) p 31-32; Encouraging renewals (47-51) p33-35; POLL are you incentivizing renewals? How? View 3 renewal scenarios (52-58) p36-38.

Building a Sense of Community (59-60) – Debrief Residents Viewpoint PREWORK (60-61) p39-40; review Community Feel/Social life/Define community/Green/Diversity (62-66) p40-42. ASK how you are encouraging diversity? (66) p42

**Course 7 – Market Analysis for Leasing Professionals – 30 slides – 2.0 hours**

PRE-CLASS PREWORK – 1) Group – Complete the Impacts Activity p.4-5 (odd Groups start with Physical Location and complete every other one; even Groups start with Physical Building and complete every other one); 2) Group – Review 4 marketing plan reasons p 6-7 and provide 3 examples for the reason numbered the same as your group; 3) Group – Read the Market on Boston profile and answer the questions as follows p 10-14: (Group 1 – 5 P’s and Media; Group 2 – Partners and Residents; Group 3 – B2B Partners and Operations; 4) Indiv – Read Marketing Math Roundup Part I. Complete both unit mixes for review in class pp. 16-19; 5) Group – Read the Case Study and prepare as many answers on pp 24-25 as possible

Introduction (5)

Impacts (6-7) – Debrief Impacts PREWORK (6-7) p4-5. Give an example like a road improvement project or a large employer comes to town.

Market Analysis (8-21) – The Marketing Plan (8-9) p 8; Debrief Reasons PREWORK p 6-7; Review Objectives and Strategies/Target Markets/Market Segmentation (11-13) p 7-8; Factors in Target Market (14) p 8-9; Market Analysis (15-19) p 9-10. Debrief Market on Boston PREWORK (20) p 10-14. Encourage students to be creative.

Market Analysis Math (22-30) – Introduce three rounds of math; Activity I (24) p 16-19, work through the definitions. Debrief Round I PREWORK p 6-7; Activity II (25) p 20-21, work through the six marketing performance calculations; Activity III (26) p 21-23, work through the 3 types of occupancy; Introduce the Case Study (27-28) . Debrief the Case Study PREWORK (27-28) p 23-25. Module and Course Summaries (29-30) p 26.