

Instructor's Guide

---

# Keys to Success in Leasing

**NALP** 

NATIONAL APARTMENT  
LEASING PROFESSIONAL®



## **NALP** **National Apartment Leasing Professional**

NAA Education Institute  
4300 Wilson Blvd., Suite 400  
Arlington, VA 22203  
703/518-6141  
education@naahq.org  
www.naahq.org

Copyright © 2014 by NAA – National Apartment Association. All rights reserved. This material is reproduced under license agreement between the National Apartment Association and the National Apartment Association Education Institute. Reproduction in whole or in part is not permitted without the express written consent of NAA.

The material presented in this program has been prepared for the general information of the reader. It does not provide all the working conditions, necessary code and safety regulations and procedures that may apply to each individual. For further information, contact a supervisor or local authorities. The material presented is believed to be accurate; however neither the National Apartment Association Education Institute, the National Apartment Association nor its chartered affiliates can assume responsibility for any damage to property or injury to persons as a result of use of the information provided.

### **Acknowledgments**

The National Apartment Association Education Institute acknowledges the contributions of countless volunteers who made this program possible. From the first time pencil was put to paper, through development, revisions and updates, pilot programs and expert reviews, the servants of our industry have made the National Apartment Leasing Professional course and designation a reality. We extend our thanks and pledge to maintain the NALP designation as the premier standard apartment industry training program for all Leasing Professionals.

## Table of Contents

	Instructor's Guide	Participant Guide
Just for Instructors	4	N/A
Warm-Up Activities	12	5
Course Objectives	15	6
Career Prospects of a Leasing Professional	16	7
Responsibilities of a Leasing Professional	18	9
Characteristics of a Leasing Professional	20	10
Your Colorful Personality	23	12
Qualities of a Successful Leasing Professional	26	15
Job Responsibilities and Goal Setting	30	18
Time Management	33	21
Teamwork	38	24
Market Knowledge	40	26
Market Knowledge Activity	41	N/A
Product Knowledge	44	28
Summary	44	29
Examination	45	29



## 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 or lay person...a seasoned instructor or a new teacher...this guide will help you become an even more engaging and effective trainer.

This education program was developed by Leasing, Operations, Marketing and Training Professionals working in the multifamily housing industry across the nation.

It was developed and revised at the request of Leasing Professionals and apartment association members, like you, who told us what they need to successfully perform their job responsibilities. It was also developed at the request of your managers, supervisors, owners and employers. They asked for this program because of your importance to the industry. They recognize you as the key to leasing, renewing and serving future and current residents of your communities and buildings.

In the Keys to Success in Leasing course, you will help Leasing Professionals:

- ▶ Describe the responsibilities of a Leasing Professional.
- ▶ Identify important personal qualities that will enhance the Leasing Professional.
- ▶ Identify the important duties of a Leasing Professional.
- ▶ Understand the importance of goal setting and list basic steps of goal setting.
- ▶ Explain product and market knowledge and how they contribute to the success of a Leasing Professional.

Although this course is targeted at people with at least six months of leasing experience, it can also be used to teach those who would like to learn more about the legal aspects of our industry.

For more information about this program or any of NAAEI's education programs, contact your local apartment association or contact NAAEI at 703/518-6141.

## Fast Facts: The NALP Keys to Success in Leasing Course

This overview will help familiarize you with the educational approach for this course and ways you can enrich the training for participants.

### Course Type

- ▶ Instructor-led classroom training
- ▶ Use short presentations, participant discussions, and learning activities to teach the course material

### Course Materials

- ▶ This Instructor's Guide
- ▶ The Keys to Success in Leasing Participant Guide

#### Legend:



*Italics*

Instructional Direction



The NALP Keys to Success in Leasing PowerPoint Presentation includes a slide on this topic

#



#

Instructor's Guide page number (*black/outside*), with corresponding Participant Guide page number (*gray/inside*)



Key pieces of information that will be part of the examination – instructors should focus on these items



## Course Length

Approximately four hours

## Course Tone

Fast paced, high-energy, experiential, fun

## Where this Course Fits in the NALP Curriculum

Keys to Success in Leasing is the first course in the NALP training series. The suggested order for delivery is as follows:

1. Keys to Success in Leasing
2. Telephone Presentations
3. Leasing and the Internet
4. The Leasing Interview
5. Leasing Demonstration & Follow-Up
6. Rental Policies and Procedures
7. Legal Aspects
8. The Market Survey

## Course Schedule-at-a-Glance

Here's a quick look at the topics included in the Keys to Success in Leasing course, the approximate time it will take to teach them, and a suggested schedule.

Training Topic	Length	Suggested Time
Introduction	30 minutes	8:30am–9:00am
Leasing as a Career	15 minutes	9:00am–9:15am
Responsibilities, Characteristics and Qualities of a Leasing Professional	60 minutes	9:15am-10:15am
Break	15 minutes	10:15am–10:30am
Goal Setting	30 minutes	10:30am–11:00am
Time Management	20 minutes	11:00am-11:20am
Teamwork	20 minutes	11:20am–11:40am
Market and Product Knowledge	30 minutes	11:40am–12:10pm
Summary and Wrap Up	15 minutes	12:10pm–12:25pm

## 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 Instructor's Guide carefully.** Get familiar with the organization and flow of the course, as well as the content itself.
- ▶ **Look for ways to personalize the instruction.** Add your own stories, examples, and insights. Make the material come alive for the participants.
- ▶ **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 Covey video activities before class.** Some modules contain activities centered on Franklin Covey teaching videos. Each contains an introduction, the video clip, concept questions, an industry-related activity and a resource sheet. You will need to hit the “next” button to drive the programming through these steps:
  - o *Play the introduction*
  - o *Play the video*
  - o *Click on each of the three concept questions that review the material in the clip*
  - o *Conduct the activity as described in your Instructor's Notes*
  - o *Review the Resource Page provided in the Covey material to close the activity*

### When it is Time to Teach the Course

- ▶ **Use this guide.** Refer to it often to keep the class on track. Using notes will make you look natural, relaxed, and yes, 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)
- ▶ Keys to Success in Leasing Participant Guide (one for each participant)
- ▶ Keys to Success in Leasing PowerPoint Slides (these are optional; use them if you wish)
- ▶ Evaluation Forms
- ▶ Sign-in form (to be turned in to the affiliate office after class)

### Prepare and Test Equipment

- ▶ Flipchart with stand or whiteboard
- ▶ Markers
- ▶ Microphone or sound system (if needed)
- ▶ Laptop computer with LCD projector (if using PowerPoint slides)



## Prepare a Learning-Friendly Classroom

- ▶ 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.

## Welcome and Introduction

- I** *In this brief opening section, you will welcome participants, introduce yourself, and set the stage for the Keys to Success in Leasing course.*



*Show Slide 1*

- I** *Welcome participants to the course. Introduce yourself to the class and have them briefly introduce themselves. You may choose to conduct an ice breaker or warm-up exercise if necessary. Then, proceed with the script below.*

*Dive in...the material is great! And you are going to do just fine, too!*

## Introduction

This first course in the NALP training series concentrates on the Keys to Success in Leasing skills to help you be an effective Leasing Professional. As your position in an organization grows, your knowledge of the industry becomes more important.

In this class, we are going to focus on the qualities and characteristics that make a successful Leasing Professional, and help you assess your own strengths and weaknesses. When you leave here, you will have the tools to work on the areas you have identified for improvement, and that will help you become a successful Leasing Professional.

**I** *Turn to page 6 of your Participant Guide, so we can go through the day's agenda, as well as cover a few housekeeping items.*

## Ground Rules

- ▶ **Participate fully.** What you get out of this class is fully dependent on what you put into it.
- ▶ **Help us stay on track.** We are going to cover a lot of ground today—at quite a fast pace—and to make sure you get the best training experience, we will need everyone to stay focused.
- ▶ **Have fun.** The amount of learning that will take place is directly proportional to the amount of fun you have.

## Questions?

**I** *Does anyone have any questions about the agenda, the ground rules, or anything else about today's session?*



## Warm-Up Activities



*Show Slide 2*

### Activity 1: Participant Inventory

- I** *The goal of this warm-up is to find out about the participants' interests and goals so that you can link classroom instructional tasks to the participant needs.*

*Ask participants to locate the "Activity 1 Inventory" in their Participant Guide. Ask participants to take about 5 minutes to respond to the questions.*

*You might want to complete the inventory yourself so that you can use your answers as a model.*

- ▶ Why did you choose to work in the multifamily housing industry?
- ▶ Of all of the multifamily positions available, why did you choose to become a Leasing Professional?
- ▶ In what work-related projects are you currently involved?

*When participants are finished, ask them to share some of their responses to various questions. You may also want to share your own responses so that the participants get to know you a little better.*



*Show Slide 3*

## Activity 2: Tales of Work

- 1** *The goal of this warm-up activity is to help the participants think about their work experience in general so that they can pinpoint specific improvement or focus areas for this program. This activity also provides an opportunity to have participants get to know each other.*

*Assign participants to a partner or to a small group (depending on overall class size).*

*Ask the participants to think about their first two weeks in their current jobs. (If they have just started recently in their position, they can think about this current time in the position. If this is their first day on the job, they can either think about a previous job or a project completed in school.)*

- ▶ *What challenges did/does this particular job have?*
- ▶ *What parts of the job are/were particularly confusing, especially at the beginning?*
- ▶ *What do you like best about the position?*

*After the pairs (or groups) have shared ideas, lead a discussion among the entire group about the commonalties and differences among experiences.*





*Show Slide 4*

## Activity 3: “I EXPECT”

- i** *The goal of this warm-up activity is to provide you with information about what the participants expect from the program, and to match those expectations to the topics and content planned during the program.*

*First, ask participants to write the answers to the questions:*

- ▶ *What do I expect from myself in this course?*
- ▶ *What do I expect from the instructor of this course?*
- ▶ *What do I expect from other participants in this course?*

*Have each participant either work alone and then share with a classmate to identify commonalities, or have them work in groups from the onset of the activity.*

*Lead a brief discussion of the expectations. Summarize by sharing some of your own expectations about the course (e.g. that everyone learns at least two new things in each program, that everyone participates, that we have fun, etc.).*

*If possible, display flipchart pages on the wall so that participants are reminded of their initial expectations throughout the program.*



*Show Slides 5 and 6*

## Course Objectives

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

- ▶ Describe the responsibilities of a Leasing Professional.
- ▶ Identify important personal qualities of a successful Leasing Professional, and discuss how these qualities enhance the Leasing Professional's job success.
- ▶ List the most important duties of a Leasing Professional.
- ▶ Discuss the importance of goal setting and list basic steps of goal setting.
- ▶ Explain product and market knowledge and how they contribute to the success of a Leasing Professional.
- ▶ Understand the Market Survey Presentation to be given at the end of the NALP program.



## Leasing as a Career

### What are the Career Prospects for Leasing Professionals?

- I** *It is important for you to “set the stage” for the entire Leasing Program by highlighting the career opportunities in the multifamily housing industry, particularly for Leasing Professionals.*

*Tell participants that together you will review the Participant Guide as you describe the future for Leasing Professionals by addressing the questions.*

*Ask participants to give their thoughts and to provide personal insights as appropriate. (By inviting participant comments early on, you have demonstrated that sharing their ideas and experiences will be important throughout the session.)*

*As a group, discuss the points found in the Participant Guide and use the corresponding paragraphs to illustrate the points. If possible, record their answers on a flipchart and display the flipchart pages in the room.*





## Show Slides 8 and 9

- 1** *Lead a discussion on the various roles of the Leasing Professional. Pose the following questions, and have participants take notes in their guidebooks as you discuss answers.*

### **Q. Why are Leasing Professionals so important to their apartment communities?**

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

### **Q. In what specific ways can a Leasing Professional impact the apartment community or building?**

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



## Q. What are some factors that make the Leasing Professional position attractive?

A. The Leasing Professional's day consists of many varied responsibilities with much time spent in communicating with residents, prospects, co-workers, vendors and area contacts. The position is considered a professional job with work typically performed in a clean office environment using office equipment (telephone, computer, fax machine) and dealing with people of all types. The work is interesting, varied and usually fast-paced. Every day is different and tends not to be boring.

## Q. What roles (like a counselor or chauffeur) does a typical Leasing Professional perform?

A. Some "roles" may include social director, chauffeur, community service representative, counselor, mathematician, administrative supporter, telephone solicitor, computer expert, etc.

## Responsibilities, Characteristics, and Qualities of a Leasing Professional

### What are the Responsibilities of a Leasing Professional?

**I** *Although some participants may already be Leasing Professionals, do not skip this section. One of the goals of this section is to give participants an opportunity to see how the responsibilities of a Leasing Professional differ from company to company, and from community to community.*

*Lead a discussion regarding the many responsibilities of a Leasing Professional. Together you will help them identify some of the key job responsibilities of Leasing Professionals even though you know many of them are already fulfilling these responsibilities.*

*Brainstorm and ask participants to record in the Participant Guide the 10 most important responsibilities in order of priority that they have as Leasing Professionals. For participants who are not Leasing Professionals, ask them what they guess would be the 10 most important responsibilities of a Leasing Professional.*



*Show Slide 10*

## Some answers include:

- Comply with all regulatory laws and guidelines
- Pre-lease apartments on vacate notice
- Inspect the “to-show” listed apartments for tour readiness
- Accept and process renewal paperwork
- Conduct follow-up telephone calls
- Communicate with residents
- Shop the competition
- Read ads and marketing materials
- Inspect apartments
- Collect deposits and pro-rated rent fees
- Conduct follow-up with prospective residents
- Recruit referrals
- Perform outreach marketing activities
- Write community newsletters
- Conduct resident satisfaction surveys
- Conduct warm calls for new move-ins
- Attend local apartment association activities
- Demonstrate the features and benefits of the apartments
- Accept and process applications for leasing
- Answer the telephone
- Conduct follow-up communications with residents
- Write service requests
- Complete market comparable reports
- Conduct onsite tours to owners or investors
- Process rental payments
- Open and close the model apartment
- Network for other participants
- Maintain daily and weekly and monthly reports
- Assist with onsite resident relations
- Maintain leasing tools (product knowledge kit, brochures, flyers, business cards), check property’s ads and Web sites
- Prepare lease documents
- Engage in ongoing professional development opportunities
- Lease vacant apartments





*Show Slide 11*

## What are the Characteristics of an Effective Leasing Professional?

- 1** *Tell participants that successful people have a lot in common, no matter what line of work they do. Through various studies, researchers have identified common personal and professional characteristics found in successful people. Some of the participants may have already read the book, “Seven Habits of Highly Successful People” by Stephen Covey.*

*Introduce the next activity in the Participant Guide, about personal attributes and qualities that reviews the Pinnacle Performance Group study on qualities of successful people.*

*Ask participants to tell you their guesses. Then present the actual results of the study:*

What are the personal qualities of a successful Leasing Professional? A May 2000 report, issued by Pinnacle Performance Group, identified nine skills that are characteristic of successful 21st century workers. These are the skills that can ensure your success as a Leasing and Industry Professional:



*Show Slide 12*

## People Skills

### 1. Communication

- Are you communicating in such a way that considers the different needs, backgrounds and experiences of people?
- Listening should become the first skill to perfect. Co-workers and supervisors appreciate people who will listen.

### 2. Teamwork

- Do you have respect and show it for each member on your team?
- Teams are made up of all different sorts of people with all different experiences and attributes. Are you working well with each member?

### 3. Coaching

- Are you a good coach to co-workers? Coaching is not just the job of the supervisor.
- It falls to each member of the team to encourage, correct and share the work at hand.



*Show Slide 13*

## Technical skills

### 4. Business Analysis

- Do you understand the business impact of your position and duties?
- Do you understand how your performance is measured? Appreciate the cost of quality in each of the duties of the Leasing Professional. Encourage your teammates to do the same.

### 5. Continuous Improvement

- Are you always on the lookout for opportunities to improve your work and your team's results at the property? A key skill will be the ability to work through problem solving, digging at the root of a problem or issue and knowing where to find participants to help solve or enhance performance.

### 6. Technology Savvy

- Are you current on the company's operating systems? Or do you just know enough to get by?
- The savvy Leasing Professional will make sure to learn how each process and operating system impacts the property and his or her area of responsibility.





*Show Slide 14*

## Administrative Skills

### 7. Project Management

- Are you able to take a project from scratch, complete each step and bring it to completion?
- While working with the project, are you able to understand the significance of each step and offer improvements if necessary? A Leasing Professional should take assignments beyond completion to understanding.

### 8. Writing and Documentation

- Are you able to compose accurate, well-written notes and communication?
- Are your e-mail skills up to speed? Leasing Professionals are a key line of communication for the community. Their written communication with residents and others should be clear, concise and carefully written.

### 9. Participant Management

- Do you see yourself as a service provider and participant to your prospects, residents and co-workers? It is not just a matter of being able to scrounge up results.
- This skill takes advantage of networking, relationships coupled with knowledge and curiosity and all combined with a desire to serve.

Each of us, no matter how we develop these skills, brings a unique personality to our position. In a similar manner, your prospects and residents have different personalities. Learning the difference and how to appreciate them is part of your training as a Leasing Professional.

- 1 *Take a few minutes to allow participants to complete the assessment and determine their personality color. While it is not necessary to review each color, be sure participants understand that each color brings a unique set of strengths and limitations to their position.*

## Your Colorful Personality

Circle the letter of the word or phrase that best describes what you are like **most of the time**. Choose only one letter from each grouping. When you are finished, total your scores for each letter.

- |  |  |  |
|--|--|--|
| 1. a. Opinionated<br>b. Nurturing<br>c. Inventive<br>d. Outgoing             | 7. a. Always right<br>b. Guilt prone<br>c. Unenthusiastic<br>d. Uncommitted    | 13. a. Self-serving<br>b. Suspicious<br>c. Unsure<br>d. Naive              |
| 2. a. Independent<br>b. Dependable<br>c. Even-tempered<br>d. Trusting        | 8. a. Pragmatic<br>b. Well behaved<br>c. Accepting<br>d. Spontaneous           | 14. a. Decisive<br>b. Loyal<br>c. Contented<br>d. Playful                  |
| 3. a. Aggressive<br>b. Frequently depressed<br>c. Ambivalent<br>d. Forgetful | 9. a. Task-oriented<br>b. Sincere<br>c. Diplomatic<br>d. Lively                | 15. a. Arrogant<br>b. Worry prone<br>c. Silently stubborn<br>d. Flighty    |
| 4. a. Powerful<br>b. Deliberate<br>c. Gentle<br>d. Optimistic                | 10. a. Tactless<br>b. Hard to please<br>c. Lazy<br>d. Loud                     | 16. a. Assertive<br>b. Reliable<br>c. Kind<br>d. Sociable                  |
| 5. a. Insensitive<br>b. Judgmental<br>c. Boring<br>d. Undisciplined          | 11. a. Power-oriented<br>b. Perfectionist<br>c. Indecisive<br>d. Self-centered | 17. a. Bossy<br>b. Self-critical<br>c. Reluctant<br>d. A teaser            |
| 6. a. Logical<br>b. Emotional<br>c. Agreeable<br>d. Popular                  | 12. a. Dominant<br>b. Sympathetic<br>c. Tolerant<br>d. Enthusiastic            | 18. a. Critical of others<br>b. Overly sensitive<br>c. Shy<br>d. Obnoxious |



- |   |   |  |
|---|---|--|
| 19. a. Determined<br>b. Detail conscious<br>c. A good listener<br>d. A party person | 23. a. Confident<br>b. Disciplined<br>c. Pleasant<br>d. Charismatic             | 27. a. Impatient<br>b. Moody<br>c. Passive<br>d. Impulsive             |
| 20. a. Demanding<br>b. Unforgiving<br>c. Unmotivated<br>d. Vain                     | 24. a. Intimidating<br>b. Careful<br>c. Unproductive<br>d. Afraid to face facts | 28. a. Strong-willed<br>b. Respectful<br>c. Patient<br>d. Fun loving   |
| 21. a. Direct<br>b. Creative<br>c. Adaptable<br>d. A performer                      | 25. a. Argumentative<br>b. Unrealistic<br>c. Directionless<br>d. An interrupter | 29. a. Action-oriented<br>b. Analytical<br>c. Easygoing<br>d. Carefree |
| 22. a. Calculating<br>b. Self-righteous<br>c. Self-deprecating<br>d. Disorganized   | 26. a. Responsible<br>b. Idealistic<br>c. Considerate<br>d. Happy               | 30. a. Merciless<br>b. Thoughtful<br>c. Uninvolved<br>d. A show-off    |

## Totals

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_
- d. \_\_\_\_\_

Total the numbers of circles you gave each letter. The letter with the highest total reflects your natural personality. If you have mostly "A's", your color is RED. Mostly "B's" means you're BLUE. Mostly "C's" colors you WHITE and mostly "D's" makes you YELLOW. The number of responses to the other letters suggests additional influences in your personality.





*Show Slide 15*

## The Color of You

### Red

**Strengths:** Excels in logical thinking; is committed to having a productive lifestyle; is dynamic and direct; thrives on independence; is a natural leader; is highly involved (a strong survivor); is creative in crises.

**Limitations:** Generally seeks to serve self (what's in it for me?); promotes turmoil and conflict when a personal goal is to be gained; is out of touch with own feelings; is always right; cannot relax and feel comfortable unless producing something; is often arrogant and defiant of authority; is inconsiderate of others' feelings (selfish); will not admit inadequacies for fear of losing power and control.

### Blue

**Strengths:** Sees life as a serious endeavor, appreciates beauty and detail; has a strong aesthetic sense, is stable and dependable (a plow horse versus a racehorse); is sincere and emotionally deep; is analytically oriented (concerned with why one behaves as he/she does); is a high achiever; has a deep sense of purpose in life.

**Limitations:** Is highly emotional; is self-righteous; is controlling; is envious of others' success if too easily obtained; is a perfectionist; is verbally self-abusive; is smug.

### White

**Strengths:** Is quiet, reflective and peaceful; has a genuine lifestyle; appears to accept life comfortably; is patient with self and others; enjoys life's simplicity; is compatible with others is kind to animals and people; blends into all surroundings.

**Limitations:** Takes a passive approach to life; is unresponsive but is not openly excited about experiences; has problems becoming intimate; is bashful and unsure of self; is easily manipulated into changing plans; is ambivalent about goals; is often lazy and unwilling to take responsibility; resists making commitments.



## Yellow

**Strengths:** Is highly optimistic (rarely depressed); likes self and accepts others easily; loves to volunteer for opportunities; sees life as an experience to be enjoyed; is flashy and fun (a racehorse rather than a plow horse) is adventurous and daring.

**Limitations:** Needs to look good socially (high priority); is irresponsible and unreliable; is self-centered; is flighty and uncommitted; is superficial; mostly interested in a good time; is unwilling to experience pain to produce quality; is overly loud in public places; exaggerates successes; is unable to confront issues.

Source: "The Color Code", Taylor Don Hartman, Ph.D.

## What are the Qualities of a Successful Leasing Professional?

- 1 *Provide a discussion regarding the following attributes typically associated with "successful" Leasing Professionals. Tell participants that top producing and highly regarded Leasing Professionals emulate these attributes as indicated in an extensive study conducted by a large group of industry Human Participant Departments. Ask participants to follow along in their guides.*



Show Slide 16

- ▶ **Positive self-image.** When people are comfortable with themselves, they are also comfortable with other people. Be sure to differentiate between "self-confidence" and "overconfidence." Many successful people have had the confidence and positive self-image to start over again when they experienced early failures.
- ▶ **Appropriate work habits.** It has been said, "If you're working 8 hours a day, you're just working for a living. If you work longer, you are working for your own success." Any way you look at it, successful people use their time well and honestly to accomplish results. It is not how many hours you work, but what you accomplish during the hours that you work.

- ▶ **Self-discipline.** This is the ability to identify and concentrate on what is important, and fight the temptation to do what comes easiest. Successful people are able to defer gratification and make sacrifices for the long-term.
- ▶ **Proper judgment.** Making wise decisions is a constant challenge, especially when there is not always time for lengthy deliberations. Sound judgment comes from experience and from the willingness to seek information and advice, and learn from mistakes.



*Show Slide 17*

- ▶ **Independence.** Learn to make decisions on your own. Take initiative to try new things. Be open to change. A spirit of independence is fine as long as you remember to be a team player and cooperate with others.
- ▶ **Ethical work behavior.** Honesty, trustworthiness, commitment and lots of communication are cornerstones of ethical work behavior. Do not get caught by over rationalization or one-time special deals. Be authentic, fair and accountable.
- ▶ **Self-awareness.** Successful people are able to objectively assess their strengths and development needs. They seek feedback from others about their impact on situations. They look for ways to maximize their strengths and compensate for limitations.
- ▶ **Strong communication skills.** Successful people are able to speak and write using clear, concise language delivered in proper tone, pitch, volume and pacing. They do not use idioms or lingo but rather easily understood terms and phrases. They do not monopolize conversations but rather seek ways to engage others in meaningful conversation.
- ▶ **High energy level.** Leasing to prospective residents and renewing current resident leases are basically sales jobs. Professional salesmanship requires a high energy level because of the demands of staying upbeat, projecting the property at its best, demonstrating and touring the apartment homes, thinking on your feet, making positives out of negatives, engaging the customers in meaningful dialogue, focusing on closing the lease, and keeping a fresh perspective with every customer.



**i** *Ask participants to give their definitions of professionalism.*

Prospective and current residents expect a lot from a Leasing Professional. They look for friendliness and a “human” touch—such as using their name and “personalizing” the leasing presentation. Prospective residents and residents want to do business with a Leasing Professional who is accurate, honest and who follows through on promises. A successful Leasing Professional is a professional. The key areas associated with “professionalism” include:

A Leasing Professional will be successful despite ongoing changes or activity in the leasing office. In fact, a successful leasing Professional understands the role of ongoing property improvements and additions. Let's look at how important change management skills are for you!

*Refer to the Resource Page to reinforce the critical concepts.*

**i** *Direct participants to follow along in their Participant Guide as you cover key areas associated with “professionalism”.*



*Show Slide 18*

**▶ Specialized knowledge.** Successful Leasing Professionals certainly have specialized knowledge. They have to know about their own community, as well as the surrounding market, including the demographics, economics, employment, housing, and other factors impacting their market.

**▶ Providing value.** Successful Leasing Professionals play an important role by assisting people in finding appropriate housing that meets their particular lifestyle needs. They also stimulate the economy by creating a community where people want to relocate and live. Leasing professionals also help integrate social values successfully into the community.

**▶ Demonstration of professionalism.** This is shown in one's image, office etiquette, language, ethical work behavior, attitude and commitment to self-improvement. A “professional image” is more than just a “polished look”. It is expressed in pride, competence, and dignity in relations with prospective and current residents, fellow workers, staff members, owners, vendors and all other persons with whom they come in contact.

## Trim Tab – Activity

- I** *Play the Covey video “Trim Tab” beginning with the Objectives introduction. After listening to the video, answer the three concept questions as a class – encourage the students to offer their personal “takes” on the lesson points.*

*Break the room into small groups (3-5 members) and ask each set to complete the following two-part exercise:*

In Part One - Select three of the nine positions below. Work in your small group to describe how each member of the onsite team can be a trim tab.

Porter	Maid	Make-Ready
Painter	Maintenance	Maintenance Supervisor
Leasing Agent	Assistant Manager	Manager

In Part Two – Each group member should identify their role from the above list and share the one “great thing” you would like to accomplish.

*Allow 10 minutes for groups to make their lists. Debrief enough of the part One answers to cover all on-site positions – if some roles are not discussed, provide trim tab solutions as a whole group. In part Two - ask several individuals to share their answers.*



*Show Slide 19*



## Goal Setting



*Show Slide 20*

## Job Responsibilities and Goal Setting

- I** *Ask participants to reflect from time to time on their own appearance, behaviors, communication and commitment asking themselves if they are projecting the “professional image” that prospects and residents expect in a Leasing Professional.*

*Make the transition to the next segment by stating, “An important part of being a professional is the ability to identify and establish goals.”*

*Ask participants to refer to the Participant Guide where together you will describe how a Leasing Professional could successfully align their responsibilities with the goals of the community.*

*Some possible answers:*

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

*Conduct the following “goal setting” activity in an effort to help participants better understand the relationship between setting goals and improving their performance as a Leasing Professional.*

*Ask the participants to refer to the Participant Guide.*

*Define the term goal as, “the end to which a person aims to reach or accomplish.”*

*Source: Webster Unabridged Dictionary*



## Show Slide 21

A goal should be:

**S**pecific  
**M**easurable  
**A**chievable  
**R**ealistic  
**T**imebound



## Show Slide 22

- I** Ask each participant to write at least two professional goals under each category. The goals should be as specific as possible and should relate to their work rather than their personal lives.

*Examples:*

*Daily: I will answer the phone with a cheerful greeting by the third ring.*

*Weekly: I will close 50% of my property visit traffic.*

*Monthly: I will make 10% more bonus money this month.*

*When everyone has finished writing two goals for each category, ask participants to form pairs and discuss their goals with their partners.*

*After about 10 minutes, lead a discussion on goal setting, specifically as it relates to the job of a Leasing Professional.*

*Use the discussion to clarify the definition of “goals,” and to ensure participants are comfortable formulating specific goals.*



## Planning in Order to Achieve Goals

- 1 *Make a transition to the topic of planning by telling the participants that planning is something we all do every day, but may not realize it. It takes planning to accomplish goals. Because there are so many tasks and responsibilities to accomplish every day, planning is especially important to being a successful Leasing Professional and achieving your goals. It is difficult to achieve a goal if you have not established a plan of action.*

*Introduce the goal-planning model by asking participants to refer to the Goal Setting model in the Participant Guide.*

*Explain the planning model (found in the Participant Guide) by describing each step in the process. Use your own illustrations to clarify each step of the process.*



*Show Slide 23*

### **Step 1: Set your goals.**

Planning begins with setting your own personal and professional goals. We set and reach goals to achieve satisfaction at home and on the job. On the job, your goals as a Leasing Professional should be in concert with the goals of the company and your own community. It is critical that the goals be specific, measurable, achievable, realistic, and timebound yet challenging.

### **Step 2: Build specific objectives and timelines.**

Goals are usually general and long-range. For example, you may set a goal of becoming the manager of your community within five years. As you learned earlier, once you have established a goal, it is important to break it down into “chewable” objectives. Dale Carnegie said, “You can eat an elephant—one piece at a time.” Then, organize the objectives into long-term or short-term steps and write them down, including target completion dates.



**Step 3: Identify barriers.**

Study your goals and objectives carefully to identify potential barriers or obstacles that may arise as you work toward goal achievement. For example, in trying to become the manager of your community, you may encounter roadblocks such as lack of formal education, inadequate money to acquire the needed educational credentials, competing obligations, and competition from other people who want that same position. This step will enable you to not only anticipate blocks, but also consider ways for overcoming or resolving those barriers.

**Step 4: Determine the contacts and skills you have to acquire.**

Once you have singled out your needs, consider sources of help and identify possible allies to be acquired as you move from one objective to another. How can you access those? How can you develop the network of contacts that can help you?

**Step 5: Prepare a plan with specific steps to meet your goal and objectives.**

Now you are ready to build a step-by-step action plan to help you reach your goals and objectives. The completion of each step might be considered an objective. Be sure to build in milestone and completion dates. Write everything down. Try to keep a balance between being too general and overly detailed.

**Step 6: Measure progress on a regular basis.**

Establish regular checkpoints to review your progress and, as needed, assess whether circumstances require changing your plans. These progress checks also provide opportunities for you to analyze your effectiveness, and identify possible reasons why you may have gotten off track.

**Step 7: Revise as necessary.**

No matter how well you have planned, things may not go according to schedule. Flexibility is important to goal achievement. Be prepared to modify your plan due to new evidence or circumstances. Sometimes it is better to revise a plan than to abort one altogether and start from the beginning.

## Time Management

**i** *Make a transition to the section on managing time by stating, "In order to be a successful Leasing Professional, you need to know and understand your time management skills and limitations. How do you think successful people manage time?"*

*Read together the following excerpt from Chicken Soup for the Soul:*

- 1 *One day, an expert in time management was speaking to a group of graduate school business participants and used the following illustration so that the participants would never forget.*

*As he stood in front of this group of high-powered overachievers, the instructor said, "Okay, time for a quiz" and, pulling out a one-gallon mason jar, set it on the table in front of him. He also produced about a dozen fist-sized rocks and carefully placed them, one at a time, into the jar. When the jar was filled to the top rim and no more rocks would fit inside, the instructor asked, "Is this jar full?"*

*Everyone in the class yelled, "Yes."*

*The time management expert replied, "Really?" He then reached under the table and pulled out a bucket of gravel. He dumped some gravel in, then shook the jar causing pieces of gravel to work themselves down into the spaces between the big rocks. He then asked the group once more, "Is the jar full?"*

*By this time the class was on to him. "Probably not," one of them answered.*

*"Good!" the instructor replied. He then reached under the table again, bringing out a bucket of sand. He started dumping the sand in the jar, where it into all of the spaces left between the rocks and the gravel. Once more he asked the question, "Is this jar full?" "No!" the class shouted.*

*Once again he said, "Good." Then he grabbed a pitcher of water and began to pour it in until the jar was filled to the brim. Then he looked at the class and asked, "What is the point of this demonstration?"*

*One eager beaver raised his hand and said proudly, "The point is: no matter HOW full your schedule is, if you try really hard you can ALWAYS fit some more things in it!"*

*"No," the speaker replied, "that's not the point. In fact, the exact opposite is true. This illustration teaches us that if you do not put the big rocks in first, you will never get them in at all!"*



## Show Slide 24

What are the “big” rocks in your life—time with your loved ones, your faith, your education, your dreams, your community, a worthy cause, teaching or mentoring others? Remember to put these BIG ROCKS in first or you will never get them in at all. So, hopefully tonight on the way home while stuck in the middle of your commute, or tomorrow morning when you are wishing you had just fifteen more minutes of sleep: you might remember this short story and ask yourself this question: “What are the big rocks in my life?” Then, put those in your jar first!

- I** Ask participants to relate the excerpt from *Chicken Soup for the Soul* to how successful, Leasing Professionals can optimally manage their time.

*Ask participants to think about the “big rocks” in their own lives. If time permits, ask some participants to share insights about their “big rocks.”*

## Time Management Activity



## Show Slide 25

- I** Ask participants to refer back to the *Participant Guide*.

*Ask each participant to find a partner.*

*Tell them that their task will be to discuss and list time management problems, solutions, time wasters and time enhancers as they relate to the top responsibilities of a Leasing Professional. (Example: “I spend 50 minutes a day on unnecessary interruptions”). Participants should consider each other's views on what causes them to use time as they do.*

*Have each pair report on its discussion and examples of effective and ineffective use of time.*



- 1 *Make reference to common time wasters or time management issues shared by many participants.*

*Lead a general discussion, highlighting the good suggestions that came from the group. Add your own ideas to the list, if applicable.*

Instructions: Use the space provided below to record time management problems and solutions as they relate to the responsibilities of a Leasing Professional.

List potential time management problems and time wasters:

- 1 *Some possible answers you may receive include:*

- *resident requests*
- *drop-in visits by residents*
- *drop-in visits by vendors*
- *staff requests*
- *supervisor requests*
- *lunch ideas*
- *unannounced owner visits*
- *personal phone calls*
- *equipment failures*
- *package deliveries*
- *drop-in visits by co-workers*
- *change in work activities, etc.*



List potential time management solutions and time enhancers:

① *Some possible answers you may receive include:*

- *clustering all return calls for early or last in the day*
- *ignoring off-task conversations*
- *minimizing personal telephone calls to emergency basis only*
- *asking your supervisor for a chunk of uninterrupted time each day to complete reports, etc.*
- *creating a “daily to-do” list and prioritizing by importance.*

*Ask participants to consider which responses they will use in their positions in the future. Ask participants to individually circle those responses.*

*Tell participants that time management utilizes the skills associated with setting goals and objectives, being organized, having a plan, and having self-discipline.*

*Tell participants that they will be learning other skills throughout the NALP program that will continue to assist them with effective time management and goal setting.*



## Teamwork



### Show Slide 26

**I** Ask participants to turn to “Teamwork” in the Participant Guide.

*If possible, give an example that shows how an effective multifamily housing team worked to solve a problem. Discuss how each team member specifically contributed to the success of the team’s overall goal. An example might be how the various members of an onsite team effectively worked with residents during a power outage scenario.*

*Ask a group to discuss the key points and brainstorm answers to some or all of these questions listed in the Participant Guide:*

1. “Why is teamwork so critical to the success of your management company or owner?”
2. “How can a Leasing Professional positively impact the rest of the team?”
3. “In what ways can a Leasing Professional show commitment and professionalism to all members of the team?”
4. “What are some specific instances in which a teamwork-minded Leasing Professional could build the team and reinforce property goals at the same time?”

**I** *Remind participants to keep the rest of their staff informed about the ideas and suggestions they learn in class. Participants might schedule a weekly “briefing” where they share new ideas and information from the previous class. There will be ideas in this program for managers, office workers, maintenance workers, and other Leasing Professionals. By keeping others informed, practicing good listening skills and communicating consistently, the participant is helping to build and develop their team.*

Let's look at how important teamwork is with an actual case study. The Leasing Professional plays a significant role in team success.



Show Slide 27

## COPA Airlines – Activity

- 1 Play the Covey video “COPA Airlines” beginning with the Objectives introduction. After listening to the video, answer the three concept questions as a class – encourage the students to offer their personal “takes” on the lesson points.

Break the room into small groups (3-5 members) and ask each set to complete the following:

In small groups, use one of the goals below and describe how each member of the team can assist with strategies to meet the goal.

25 make-readies in 25 days

Locate and set-up a new model

95% Resident satisfaction rating

85% renewal capture

24 hours service order response

No work site injuries

- 1 Be sure the group addresses all on-site team members and their individual roles in accomplishing the sample goals. Allow 10 minutes for groups to make their lists. Ask several groups to share their answers.

Refer to the Resource Page to reinforce the critical concepts.



## Market and Product Knowledge

### How Market Knowledge Helps You as a Successful Leasing Professional

- I** *Ask participants to refer to their Participant Guide to follow along with you as you briefly cover some general information about “Resident Profiles” and “Market Knowledge.”*

*Ask for a definition of Resident Profile. **A definition of “Resident Profile” is specific information that describes the apartment community’s typical residents and their needs, wants, and qualifying characteristics.***

*Ask participants to describe a Resident Profile. (Answers: typical persons or groups of persons who rent apartments at a specific apartment community.)*

*Ask for some examples. (Answers may include participant populations, mixed groups including singles, couples, roommates, families, seniors, renters seeking certain amenities and conveniences, etc.)*



*Show Slide 28*



## Market Knowledge Activity Part I

- 1 Ask participants to turn to “Market Knowledge” in the Participant Guide.



Show Slide 29

- 1 Discuss the working definition of “**Market Knowledge**”—the demographic and product information about their apartment community, its primary competitors and potential future competition including housing being planned and/or under development in their area.

Ask participants to think about their own apartment community.

Ask them to list specific demographic information unique to each of the apartment home types for their community. Ask them to include information about their own apartment community’s resident profile including the typical make-up of “households,” income brackets, employers, types of jobs, how many vehicles, pets etc.

After all have recorded their specific information, ask several participants to share their answers and the reasons for their answers.

Ask participants to refer to the Participant Guide as you further discuss and read aloud information about “Market Knowledge.”

Read aloud:

Most apartment communities have competitors; that is, other apartment communities that target the same resident profile as their own apartment communities. It is important that participants shop the competition regularly and develop the same product knowledge of the competition that they have of their own apartment community.



**I** *Ask participants how Leasing Professionals can use Market Knowledge.*

*Answers may include:*

- when overcoming a prospect's objections*
- during the showing and leasing of an apartment*
- using effective marketing strategies*
- targeting a qualified profile for a community*
- preparing for and demonstrating effective leasing techniques.*

*Read aloud:*

*Knowledge of the competition is very valuable when a prospective resident mentions having visited (either in person or via the Internet) a competitive apartment community. By being prepared and understanding the competition, a successful Leasing Professional will already have a good understanding about precisely what information the prospective resident has gleaned from the competitive community. This knowledge of your market will help you overcome objections and counter positive points the competing property may have made.*

*Remind participants they will have an opportunity to better understand the role of Market Knowledge as they prepare their Market Survey Presentation.*

*Introduce the concept of a Competitors Notebook.*

- I** Spend a few minutes discussing and defining the concept of “Product Knowledge.”

**One definition: Product Knowledge is the thorough understanding of all of the products and services available in one’s own community, apartment home, amenities, the surrounding neighborhood, and that of their area’s competitors.**



*Show Slides 30 and 31*

- I** Remind participants that the three basic areas of Product Knowledge are:

- Detailed knowledge of the apartment homes themselves;
- Thorough knowledge of the apartment community, including its residents,
- Extensive knowledge of the neighborhood in which the apartment community is set.

*Point out the importance of product knowledge to the success of the Leasing Professional as discussed in the Participant Guide:*

Without comprehensive product knowledge, you cannot perform at your peak leasing ability. Prospective residents look for certain features and benefits in an apartment home, including those features that you may not think are important. For example, do you know the insulation rating for the apartment homes at your community? Someday, a prospect will ask you that question.

It is always helpful to have a supply of facts, figures, and anecdotes about the apartment community that illustrate what it is like to live at your community and to answer prospective resident’s questions.

## Product Knowledge

1 *Direct the participants back to the Participant Guide.*

*Ask the participants to carefully inspect their own community, its apartment homes and amenities as well as visiting the area around their community or building to compile a good list of the positive selling points that they observe.*

*Remind them to consider listing the following area or neighborhood selling points: dry cleaners, area recreational facilities, restaurants, postal boxes, business service centers, schools, public transportation, highway access, banks, neighboring parks, senior citizen activity centers, medical care facilities, etc.*

*Suggest that this information be kept readily available in a Leasing Notebook.*

*Remind them that product knowledge will be an important part of the Market Survey Presentation.*



*Show Slides 32 and 33*

## Summary

At this point, you should summarize this portion of the course.

Ask participants to close their Participant Guides and give one example of something they remembered or learned from each of the main headings of the program.

## Exam

The NALP exam is comprehensive and delivered online. The NALP Exam is 100 questions and timed for 1 hour and 30 minutes. All participants must enroll in the designation program to be eligible to sit for the exam. To enroll in the NALP course, direct participants to the NAA Web site at:

[www.naahq.org/education](http://www.naahq.org/education)

Participants will need an eligibility code to sit for the exam. The Eligibility Code will be e-mailed to each Affiliate after a participant enrolls in the course. Eligibility Codes are unique to each participant and are the key to unlocking the exam.

The passing point for the comprehensive exam is 70 or above.

Each participant will work individually on the exam. There should be no discussion among participants and no books are allowed to be used as reference.

For more detailed information on the exam and to download the Participant and Instructor Guides, please visit the NAA Web site:

[www.naahq.org/education/designationprograms/Pages/OnlineExams](http://www.naahq.org/education/designationprograms/Pages/OnlineExams)