



LENNOX COMPANIES

LEASING HANDBOOK

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LEASING HANDBOOK

Introduction

Welcome aboard and congratulations on your new position as Leasing Specialist for Lennox Companies! You are the heart and face of our company and in conjunction with hands-on training from your Supervisor, this Handbook will serve as your training guide to ensure your success. At Lennox Companies, we firmly believe that a well-trained employee has the opportunity for unlimited growth potential.

Being that you are the first person someone encounters when walking into your community it is imperative that you understand just how important you are! The prospective resident's impression of the company and property is initially based on his or her first contact with you. If you have a positive attitude and a passion for excellence, these traits will reflect in exceptional results for you and your community.

The structure of Lennox Companies is important; however, you are part of a team, each part relying on the other. Success comes from understanding the company and its different levels working together toward our Core Values – Integrity, Customer Service, Respect, and Responsibility.

Again, congratulations on taking this important step in your career. We look forward to watching you succeed as you grow within not only our company, but our industry as a whole.

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1. JOB DUTIES

Section 1.1 Essential Job Responsibilities.

- Fair Housing Certification within first 90 days of employment
- Full knowledge of Leasing Handbook and Lennox Operations Manual
- Maintain a clean and professional appearance at all times throughout the workday and/or whenever present at the community
- Ensure desk is clean, organized, and free of clutter
- Ability to work a flexible schedule, including potential evenings, weekends, and/or holidays
- Possess a positive attitude and the ability to smile under all circumstances

Section 1.2 Leasing.

- Greet prospects, qualify and determine their needs, and professionally present the community
- Answer incoming calls and transfer to Assistant Manager or Community Manager when needed
- Demonstrate community and individual apartment knowledge to prospects by communicating features and benefits. Close the sale!
- Inspect models and market ready vacancies daily using a sparkle kit.
- Input all prospect information in Entrata
- Have prospect complete application in accordance with company procedures and Fair Housing requirements
- Submit processed applications to Community Manager for approval and follow up with applicant regarding status
- Follow-up with prospects that did not close and attempt to close the sale again.
- Properly store packages as received and maintain package log

Section 1.3 Administrative.

- Accept rental payments and immediately give to Assistant Community Manager (or Community Manager if there is no Assistant). Do not include cash or incomplete money orders
- Organize and file reports, leases, and paperwork daily
- Assist Community Manager and Assistant Manager in preparation of reports or other various tasks as needed
- Type leases along with appropriate addendums/additional paperwork and on a timely basis
- Distribute all company or community-issued notices
- Complete and send accurate monthly leasing commission spreadsheet to Community Manager on 1st of the month for preceding month
- Maintain resident files

- Document all resident communication (written and verbal) in lease file conversation log
- Inspect grounds while out in community – dispose of litter, report lease violations, fill out Service Requests for items that need attention from Maintenance Team

Section 1.4 Resident Retention.

- Follow up with lease expirations as directed by your Community Manager
- Receive all e-mails, calls, and in-person visits. Listen to resident requests, concerns, and comments.
- Contact residents with completed Service Requests weekly to ensure satisfaction
- Plan, create e-mail/flyer, attend, and participate in monthly resident events

Section 1.5 Marketing.

- Check all online advertising sources weekly to ensure correct information is displayed
- Post to community's Social Media pages (i.e. Facebook, Twitter, Instagram) at least twice weekly. Keep it professional, use images, use community/city specific information when at all possible, keep your wording to a minimum, and get your followers involved!
- Conduct outreach marketing weekly to obtain prospective residents
- Conduct market surveys by the 15th of each month and e-mail to Community Manager
- Shop competitive communities as required
- Hang balloons, banners, flags as dictated by your community

Section 1.6 Office Responsibilities.

- Only leaseholders may pick up packages stored in office. A signed release from resident must be in lease file authorizing someone other than resident to pick up package. Always ask for a photo ID if you're unsure as to who the person is!
- Packages must be stored immediately and not left out in office
- Desks are for working and NOT for eating
- If leaving the office without another person present a sign must be displayed on the front door with the expected time to reopen
- The office is not to be closed for lunch unless only one employee is on duty. Contact Community Manager for policy regarding weekend lunches.
- Office kitchen is to be kept clean at all times
- Wear name badge at all times
- Assist team effort in any way possible
- Act responsibly and in the best interest of the community

2. LEASING TERMINOLOGY

Section 2.1 Definitions of Commonly Used Words.

Below are commonly used Leasing terms. Keep this guide handy until you've mastered all of the terminology in your new career!

- **Addendum:** An additional document that may be added to the lease in circumstances that are not addressed in the original lease. Pet fees, cleaning fees, or property maintenance fees may be examples included in an addendum.
- **Amenities:** Facilities provided by the apartment community. These can include swimming pool, landscaped gardens, club house, playground, etc. These constitute the “extras” and are intended to improve the quality of life of the residents in the community.
- **Apartment Amenities:** The features and services offered by an apartment community. These can include spacious walk in closets, stainless steel kitchen appliances, Wi-Fi access, granite countertops, etc.
- **Application Fee:** A non-refundable charge paid by each applicant for the cost of processing a rental application.
- **Arrears:** Overdue rent
- **Available Apartment:** A vacant apartment or apartment on notice that does not have a deposit on it, and is ready to be rented.
- **Availability:** The percentage of apartments available to rent. Divide the number of units available by the total number of units.
- **Availability Report:** A report within Entrata that details what apartments are available to lease and what apartments have scheduled move-ins.
- **“Be-Back”:** A person who has already been shown an apartment, and returns for another visit. Also called a “Return”.
- **Closing:** Asking directly for the money. Closing is a continuous process from the moment you first have contact with the prospect until they pay the deposit.
- **Closing Ratio:** The percentage found by dividing the number of rentals by the amount of traffic. May be determined for a daily, weekly, or monthly sales figure.
- **Commission:** Money that a Leasing Specialist receives for leasing an apartment.
- **Community:** The preferred term for the quality, neighborhood style atmosphere found at our properties.
- **Credit Check:** A part of processing a rental application, to verify that the applicant pays his or her debts on time and is not overextended.

- **Deposit:** Also known as a Security Deposit, is a fixed sum paid by the prospect to cover reasonable losses.
- **Eviction:** The legal process of removing a resident or residents from a property for not meeting the terms of the lease.
- **Feature/Benefit Selling:** A technique where the Leasing Specialist expresses not only the unique feature (spacious patio) of the apartment or community, but also the benefit to the prospect (plenty of room for sunbathing).
- **FMO:** Financial Move Out
- **Greeting:** The initial contact made with a prospect when he or she visits your community. Elements of a success greeting include standing, smiling, introducing yourself, and shaking hands.
- **Guarantor:** A person who agrees to pay the expenses should a resident not meet the financial obligations agreed to after signing a lease. A guarantor is sometimes required when a resident has no credit, a limited amount of credit, bad credit history, or a lack of suitable income.
- **Guest Card:** Filled out in Entrata by the Leasing Consultant for each prospect. Used to qualify the prospect, determine his or her needs, and to track follow up contact.
- **Half-Bath:** A bathroom that has no shower/tub.
- **Hot Button:** An issue or item that your prospect feels strongly about, and you can use to help sell your community. Example: Prospect states, "I have very noisy neighbors, and they drive me crazy." You might then respond, "The great thing about apartment #112 is that it is in the corner, so you have only one common wall with a neighbor. This will offer you the privacy you are looking for."
- **Lease Agreement:** A legal, binding contract between owner and resident that locks the rental rate and terms of residency.
- **Lease Term:** The length of time that a lease shall be in effect; duration of obligation
- **Lessee:** Resident
- **Lessor:** Rental property owner
- **Look-And-Lease Special:** Apartment communities offering a "Look & Lease" special meaning prospects who view the property and lease a unit in the same day receive a discount.
- **Market Ready:** An apartment that is cleaned, painted, and in good order and ready to be move in to.
- **Market Rent/Market Rate:** Following the analysis of current market conditions, the most probable price that a property should be listed in the open market.
- **Marketing Plan:** A written program outlining all plans for promoting your community to the public.
- **Market Survey:** A report detailing the rental rates, occupancy rates, features, amenities, and special promotions going on at neighboring communities. The Market Survey is an extremely useful tool when planning marketing promotions or rental rate changes.

- **Mini-Model:** A vacant apartment that is decorated with inexpensive accessories to make it more attractive to the prospect.
- **Move-in Specials:** Apartment communities offering lease incentives such as “1 month free upfront or prorated”, “no application fee”, etc.
- **NOI:** Net Operating Income
- **Notice to Vacate:** Written notification from the resident to the leasing office stating the resident’s intention to move out on a specific date in the future (minimum 60-day notice). Such notice gives the office the authorization to lease the apartment after the scheduled move out date.
- **Objection:** An obstacle that stands in our way and may prevent us from successfully closing the sale. Example: “I love everything about this apartment home except that there is not enough closet space.” When a prospect takes the time to point out what they dislike, that means they are considering the benefits of your community. Learn to respond to objections and close the sale anyway.
- **Occupancy Rate:** The percentage of apartment that are occupied. Divide the number of apartments occupied by the number of total apartments.
- **Occupied:** An apartment that has a lease on it and is producing income.
- **“Open an Apartment”:** Prepare an apartment for prospect viewing by turning on the lights, setting a comfortable temperature, turning on music, etc.
- **Pro-Rate:** Adjusting a month’s rent by the number of days that the resident actually occupies the apartment home. Found by dividing the monthly rental rate by the actual number of days in the month, and then multiplying the daily rate by the number of days occupied.
- **Prospect:** Someone looking for an apartment.
- **Punch-Out:** Maintenance activity involved in making a vacant apartment ready for move in.
- **Qualifying Questions:** Questions asked to obtain information to determine and satisfy the needs of a prospect. Also helpful in determining a prospect’s eligibility for residency.
- **Resident:** The preferred term for the party who has possession, use, and occupancy of an apartment as a result of a lease.
- **Referral Fee:** A commission paid to a resident for referring a new prospect to us who then leases and occupies an apartment. Not used at all communities.
- **Service Request:** A form used to record requests for maintenance service from residents.
- **Shopper:** A person who is hired to pose as a prospect, but who is actually evaluating the Leasing Specialist on his or her performance
- **Shopper’s Report:** A written account of the shopper’s visit to your community
- **Skip:** An apartment that is deserted while under lease. Also used as a verb, as in “That resident skipped out and owes a month’s rent.”
- **Sparkle Kit:** Bucket or bag full of miscellaneous cleaning supplies if the apartment needs to be freshened between cleaning and occupancy.
- **Tour:** Showing a prospect a model or vacant apartment.

- **Traffic:** Another term for prospects who tour.
- **Vacant:** An apartment that is unoccupied and not producing income
- **Wait List:** A system of renting to prospects for future move in dates.
- **Work Orders:** Another name for Service Request.

Section 2.2 Use This – Not That.

Just as terminology has evolved in restaurants and airlines, multifamily housing is no stranger to the changes. This change comes from our values based on customer service and a sense of community pride. It may feel “weird” or “different” to use these words at first, but you’ll soon find yourself correcting people in your life outside of leasing!

- Apartment Home NOT Unit
- Community NOT Complex
- Community Manager /Management Company/Apartment Community NOT Landlord
- Resident NOT Tenant
- Service Request NOT Work Order
- Water Damage NOT Mold

3. MAINTENANCE

Section 3.1 What Is an Emergency Service Request?

Scenario: Maintenance has left for the day or it’s a Saturday and your Maintenance Team is off. A resident calls in with a service request, but how do you know if it’s an emergency warranting a phone call to your on-call Maintenance Technician? The list of items below typically requires an immediate response, but be sure to review property specific emergency situations with your Community Manager to ensure your list is comprehensive for your Community.

- **Heat:** If a resident complains of no heat or malfunctioning heat in the apartment, we must respond if the outside temperature is below 60 degrees.
- **Air Conditioning:** If a resident complains of malfunctioning air conditioning, we must respond if temperature is in excess of 80 degrees or the resident has a medical condition requiring air conditioning.
- **Broken Window, Door, Latch, or Lock:** All entries must be secured promptly.
- **Frozen Pipes**
- **Lock Out:** Each community must create, implement and publicize a policy regarding residents who are locked out of their apartment. If it is your policy NOT to assist after hours, you must provide your residents with an alternative such as a locksmith’s number.
- **Water Leak:** All water intrusion is considered an emergency.

- **No Electricity:** If the utility provider has shut off utilities, put the resident in touch with utility provider for service.
- **Suspected Gas Leak**
- **Fire:** Call the Fire Department immediately. Let the Fire Department take charge of the situation, but have Team Members available to assist them as needed.
- **Animal in Apartment:** Respond at once if a resident reports a strange or wild animal in the apartment. You may need to call in an exterminator, licensed wildlife relocation officer or police officer to assist.
- **Toilet Inoperable in 1 Bathroom Apartment**

Section 3.2 After the Service Request Has Been Completed

After your speedy and efficient Maintenance Team has completed the service request it is your job to follow up with the Resident. Your Community Manager will give you a list of completed Service Requests whereupon you will call each resident to ensure their satisfaction of completion. When calling the Resident be sure to state why you are calling, stating specifically the issue occurring in their apartment at the time of their request, and if it since been completed to their satisfaction. You will also need to inquire if they have any other concerns or requests at this time. This is the key to resident retention and one simple phone call will go a LONG way!

4. FAIR HOUSING

Section 4.1 Protected Classes.

The Fair Housing Act (Title VIII of the Civil Rights Act of 1968 and the 1988 Fair Housing Amendments Act) prohibits discrimination in the sale, rental, and financing of dwelling based amongst 7 Federally Protected Class.

- Race
- Color
- Religion
- Sex
- Handicap
- Familial Status (including children under the age of 18 living with parents or legal custodians, pregnant women and people securing custody of children under 18)
- National Origin

Section 4.2 What is Prohibited?

Such prohibited actions as pertaining to race, color, religion, sex, handicap, familial status, or national origin include:

- Discouraging any person from inspecting and/or renting a specific apartment

- Failing to inform of desirable features or exaggerating drawbacks
- Communicating to any prospect that they would not be comfortable or compatible with existing residents
- Assigning a resident or showing a prospect a particular section of the community including floor level unless it is specifically requested
- Denying or delaying the processing of an application or refusing to approve such a person for occupancy
- Charging rental rates or deposits inconsistently
- Using different qualification criteria
- Evicting residents because of race, color, religion, sex, handicap, familial status, or national origin
- Limiting services or community amenities
- Failing or delaying unit service or repairs
- Falsely deny that housing is available for inspection, sale, or rental

Steering: Discouraging a person from seeking housing in a particular community, neighborhood, or development because the person is or is not a member of a protected category. For example, a real estate agent shows a black person housing in predominately black neighborhoods and a white person housing in predominately white neighborhoods.

Interference, coercion, or intimidation: Trying to limit the benefits of renting or buying housing in an area because the person is a member of one of the protected categories. This includes trying to coerce, threaten, intimidate, retaliate against, or interfere in any way with the use and enjoyment of housing.

Discriminatory advertising: Advertising or making any statement which indicates directly or indirectly an intent to make a limitation, specification, or to discriminate with respect to members of one of the protected classes.

Blockbusting: Trying, in a direct or subtle way, to scare a person into moving out of a neighborhood by representing that a person from one of the protected categories is considering or is in fact moving into the neighborhood. For example, stating that the neighborhood would decline or that the crime rate would increase if members of a protected category moved into the neighborhood would be unlawful.

Section 4.3 Common Questions

Q: Does an owner have to rent to a person just because he or she is in a protected category?

A: No. Owners may rent or sell to whomever they choose as long as their decisions are not based on the fact that a would-be resident is a member of a protected category. If someone from a protected category becomes a resident, the owner may hold that resident to the same standard of performance and behavior as everyone else.

Q: What conditions are considered handicaps under the fair housing laws?

A: A handicapping condition exists if someone has a physical or mental impairment which substantially limits one or more major life activities. Some examples are: physical disability, mental illness or retardation, cerebral palsy, muscular dystrophy, cancer, heart disease, Human

Immunodeficiency Virus (HIV) infection or AIDS, drug addiction (other than addiction caused by current, illegal use of a controlled substance) and alcoholism. However, a community does not have to rent to anyone, including a handicapped person, who would constitute a genuine, direct threat to the health or safety of other residents or whose tenancy would result in substantial physical damage to the property of others.

Q: Does a community have to allow a handicapped person to make modifications to a rental unit?

A: Yes. If a community rents to a handicapped person, the community must allow the handicapped person to make reasonable modifications to the existing premises as necessary for the full enjoyment of the premises, such as widening doorways, installing handrails, and installing wheelchair ramps. However, the handicapped person is responsible for the cost of the modifications. A community may condition permission to make modifications on the resident's agreeing to restore the interior of the premises to the original condition if the modifications made by the handicapped resident would interfere with the next resident's reasonable use and enjoyment of the property. The community may also withhold permission until seeing a description of the proposed modifications which provides reasonable assurance that the modifications will be done in a workmanlike manner.

Q: Can a community charge a higher security deposit to a handicapped person who makes modifications to a rental unit?

A: No. However, if the nature of the modifications is such as would interfere with the next resident's use and enjoyment of the property, and correction of the modifications would be especially costly, the community may, as part of a restoration agreement between the community and resident, require the resident to pay into an interest-bearing escrow account a reasonable amount to cover restoration costs. The resident would be entitled to any interest which accrues on the escrow account.

Q: Does a community have to make other accommodations for a handicapped resident?

A: Yes. A community must make reasonable accommodations in rules, policies, practices, or services as necessary to afford a handicapped person equal opportunity to use and enjoy a housing unit, including personal and common use areas. Two examples include allowing a visually-impaired resident to have an animal in a community where no pets are allowed, and not charge a pet fee, or allowing a resident with a serious heart condition to have a reserved parking space close to the resident's apartment (resident must pay for the signs and markings).

Q: If a community has available units which are equipped for the handicapped, does a handicapped person have to take one of those units?

A: No. A community can advise a handicapped person of the availability of specially equipped units, but the handicapped person must be allowed to choose from any of the units which are available.

Q: Can a community segregate families with children from other residents?

A: No. A member of a protected category may not be assigned to a particular section of a community, neighborhood or development, or to a particular floor of a building, because of being a member of a particular category.

Q: Are “adults only” communities allowed?

A: No, unless they qualify for the one of the exemptions which allow for adults-only housing for elderly persons.

Q: Can a community or agent limit the number of children allowed in a bedroom, or prohibit the sharing of bedrooms by children of the opposite sex?

A: No. Although a community may set “occupancy standards” for the number of people that will be allowed to live in a unit, the standards should not be based on the age or sex of the individuals. NOTE: The fair housing laws do not limit the applicability of any reasonable local, State, or Federal restrictions regarding the maximum number of persons permitted to occupy a housing unit.

Q: Can we still have “specials”?

A: Yes. All specials must be in writing, documented and offered to everyone. A verbal special is potentially very dangerous because there is no way to prove that such a special was offered to every prospect. Rather than use phrases such as “Ask me about our specials”, we need to be specific (e.g.; \$20 off all 3rd floor one-bedrooms, expires April 30th).

Q: CAN I BE HELD PERSONALLY RESPONSIBLE FOR DISCRIMINATION?

A: YES, YES, YES! A Leasing Specialist or other on-site employee can be **named personally** in a discriminatory lawsuit and **subject to personal liability and equal fines** if found in violation of the law. Lennox Companies expects all employees to conduct themselves in a manner that will convey our commitment to Fair Housing Practices

5. COMMUNITY APPEARANCE

Section 5.1 Curb Appeal.

We all know the old saying “you never get a second chance to make a first impression” and it couldn’t possibly be more true. Before you get to wow them with the rock star Leasing Specialist you are becoming they are first going to judge you based upon the look of your community. Studies show up to 70% of your prospect traffic can be “drive-by.” Actually, 100% of your physical prospects are drive by, right? They all eventually walk or drive to your community, so your community curb appeal can be one of your most valuable leasing tools. The image you project from the first moment the prospective resident visits your apartment community must be an image of pride and professionalism. This image already has begun to form in the prospective resident’s mind even before they enter the leasing center. If your grounds are littered with debris, the signage is in disrepair, and the parking areas are not clean or are cluttered, the statement being made is a clear lack of caring for your apartment community or the residents who live there. The prospects and residents need to know that you care about every aspect of your community and with commitment from you and your team you can ensure this happens! The curb appeal for your community needs to be evaluated daily.

- Entrance of the Community
 - Entrance sign

- Flags
- Banners and bootleg signs
- Balloons
- Marquee
- Lighting
- Landscaping
- Community grounds
- Driveway and parking lot
- Leasing Center
 - Driveway, parking lot and sidewalk
 - Landscaping
 - Entrance and exterior of building
- Amenities
 - Pool
 - Fitness Center
 - Tennis Courts
 - Volleyball Court
 - Playground
 - Picnic Area
 - Basketball Court
 - Mail Center
 - Laundry Facilities
 - Car Care Center
 - Public Restrooms
- Golf Cart

Section 5.2 Leasing Office.

Success! You wowed your prospect with your beautiful grounds and now they want to come in for a tour. The importance of a clean and inviting office is just as crucial as the grounds. This is your opportunity to convey to our prospects and residents that you are a true professional with a strong dedication to be the best. Your office needs to be cleaned and inspected daily prior to opening to make sure that the office appeals to the five senses.

- Sight
 - Carpets vacuumed
 - Front doors cleaned
 - Trash cans emptied
 - Furniture dusted
- Smell
 - Pleasant smell such as baking cookies, apple pie, or cinnamon from a scent ring or air freshener
- Sound
 - Soft, easy listening music set a low level provides a calming atmosphere

- Taste
 - Fresh refreshments in a location that guests can easily access
- Touch
 - Brochures, brag books, floor plans are available

Section 5.3 Model Apartment.

OK, you're really good at this! They love your curb appeal, the look and feel of your office, and now they want to see an apartment! Where do you take them? In addition to showing them all of the wonderful amenities you offer at your community the model apartment is a key factor of your tour. So what is a model apartment anyway? A model apartment is a designated vacant apartment that has been decorated with furniture, accents and décor, and is set up in a "model home" type setting. The model apartment is one of your biggest selling tools as most people find it difficult to imagine how an apartment will look furnished. The prospect sees how versatile and livable the apartment home can be and also gives them ideas of how he or she could furnish and arrange his or her own apartment. Now your prospect can envision the apartment as home, not just vacant rooms.

It is important to show your model apartment first, followed by a vacancy that is similar to one which the prospect will be preleasing. Give your prospect every tool they need in making their decision to lease at your community. Take them to the location of the apartment home that will be available and point out its own special features. If the exact apartment home you are quoting your prospect is available to see it's still important to show your model apartment first so they can get the visual perspective of how beautiful their very own apartment at your community is going to look. Remember, nobody is living in your model apartment and it can quickly become "stale". It is your responsibility to see that your model apartment is well maintained. The following procedures should be used:

- Walk your model apartment(s) no later than 15 minutes after opening!
- Make sure your path to the model is free of trash, landscaping is maintained, sidewalks are clean, and the breezeway/entry door are clean
- All lights are turned on
- Blinds are open
- Pleasant smell
- Pleasant music
- Comfortable temperature
- Free of bugs and trash
- Carpets are freshly vacuumed
- All toilets are flushed
- Furniture is dusted
- Everything is in working order. If something requires a service request, make sure the request gets put in immediately upon your return to the office
- Balconies/Patios swept
- At the end of the day, the model apartment should be walked and closed.
 - Lights are turned off
 - Blinds are closed

- Thermostat is adjusted

Section 5.4 Mini-Model.

A mini-model is equally important as your model apartment. A mini-model does not contain large furniture, but has some decorations such as curtains, towels, miscellaneous decorations, etc. At least one of each vacant unleased floor plan should be mini-modeled at all times. These are typically your apartment homes that have been vacant the longest, but discuss with your Community Manager which apartment homes he/she would like to be mini-modeled. The above list of procedures for model apartments regarding cleaning should also be followed daily for mini-modeled apartments.

6. THE FIRST IMPRESSION

Section 6.1 First Impressions Last a Lifetime.

As a leasing professional, you can either make the deal or blow it with the greeting. First impressions last a lifetime.

STOP whatever you are doing when someone enters your leasing office

SMILE – the single most powerful human bonding behavior

STAND UP and walk towards the person. Standing communicates respect and willingness to help. Don't make them come to you.

SHAKE HANDS and **WELCOME THEM** to your community. If you aren't comfortable shaking someone's hand, practice.

INTRODUCE YOURSELF and don't be a stranger. People like to know whom they are dealing with. When you tell the customer your name, how could they not tell you theirs? It is easier to get acquainted when you know each other's name. Use their name often during their visit to the property.

You only get one chance to make a first impression! Make sure that during their first visit to the community, you are making them feel welcome and that you are there to help them find the perfect apartment home. The first sign that the prospect is important is when you immediately stop what you are doing. Remember, they have contacted you because they want and need to move. Prospects aren't browsing without a purpose when they visit your community; they are waiting for you to show them why there's no other choice! No matter what the prospect tells you, almost all prospects will make a final decision within 48 hours after meeting you.

When answering the telephone, the same holds true. Answer the phone by the second ring and never let the phone continue to ring. Always **SMILE** while you're speaking. The person on the other end can tell! Honest! Be ready to begin the conversation when you answer the telephone. In other words, do not pick up the receiver while continuing a conversation with someone in the

office. The key to using the telephone successfully is in your personality. Prospects cannot see you, but they hear everything you say. This makes a lasting impression. You never have a second chance to change their first impression. Always remember that your goal of a telephone call is to make the appointment for the prospect to visit the community. Create a desire in the prospect so that he or she will want to see what you have to offer!

7. QUALIFYING THE PROSPECT

Section 7.1 The Qualifying Process.

Once you have greeted your prospect in a professional manner, you need to get to work and determine their needs. During the qualifying process you are not only determining the prospect's needs, you are also making sure the prospect meets our rental qualification guidelines.

- What exactly are they looking for?
- When do they need the apartment?
- What is their price range?
- Are there any specific needs or wants for their new apartment home?
- Is a view important to them?
- Do they have a floor preference?
- What type of lease term are they interested in?
- Do they have pets? If so, what type and how many?
- How many people will be occupying the apartment?
- How did they hear about your community?
- Do they work close by? This is the perfect segue to discuss your income qualifications.
- What is about your current home that is prompting your move?
- Any other questions that may arise during your conversation! Ask as many questions as possible. This will only help the both of you in the long run!

While qualifying your prospect you need to simultaneously complete a guest card through the "Create a New Lead" option in Entrata. As you are completing the guest card, make sure that you are explaining to the prospective resident the purpose of all the questions. You want to put them at ease so that you can get the information you need.

- "I'd like to make the best use of your time. May I ask you a few questions?"
- "Would you mind if I asked you just a few questions, to better help you find your new home?"
- "In order to find the right apartment home for you, may I ask you a few questions?"

While you are completing the guest card, you want to be familiar with the form and the information required. If a prospective resident feels comfortable, you will get more information to assist you in finding the perfect new home for them.

When you are determining their needs and qualifying them, make sure that you are doing it in a conversational manner and that they don't feel that you are interrogating them. When all else fails, practice!

Section 7.2 When the Prospect Qualifies.

When you have qualified a prospect over the telephone, you must close the the telephone call by making an appointment. Offer the prospect a choice of day and time, rather than just asking when he or she wants to visit the community. Say something such as, "Would this afternoon at 3:00 be a good time for you to visit our community? I know that you're going to fall in love when you see it!" Before ending your telephone call make sure that you let them know your name again in case they've forgotten and that you look forward to meeting him or her. Make them feel a sense of obligation to keep the appointment!

When you have qualified a prospect in person and have gotten to know their needs, you need to ask them if they would like to take a property tour with you. No matter how you ask the question, make sure that you are offering to show them an apartment home and tour your community. Don't wait for the prospect to ask you to see something.

- "Based on the information you have given me, I have the perfect apartment home available for you! This particular home is on the end of the building, so it has more windows. You can actually see the sunset from your balcony! Let's go take a look."
- "I can't wait to show you your new apartment home. I know you are going to love it."
- "Ms. Smith, the perfect apartment home is coming available just when you need it! It is one of our largest apartment homes and the carpet is almost new – I know that is important to you."
- "From what we've discussed, I have just the right apartment for you. Would you like to take a property tour with me?"

Section 7.3 When the Prospect Does Not Qualify.

If the prospect does not meet your community requirements, it is important that you clearly explain the reasons. Consistency is required by law, but it is also required that you be specific.

If the prospect has a pet that does not meet your standards, or if there are more occupants than allowed by your occupancy guidelines, you should inform the prospect that he or she does not qualify at the present time due to that particular reason.

It is always a good idea to close on a positive note. You might say something like, "Ms. Smith, if for any reason your situation changes, I hope that you will call us again." Remember to always be consistent. If you say this to one prospect who doesn't qualify, you must say it to everyone who doesn't qualify.

8. THE COMMUNITY TOUR

Lights. Camera. Action. You're on stage and this is your opportunity to bring your best performance to the table!

Section 8.1 Identification.

A current government issued photo ID must be obtained from every prospect prior to leaving the office before touring the community. This includes all persons ages 18 and over even if they are only accompanying the prospective resident. The ID must be current and have a picture matching that of the person.

What are acceptable forms of ID?

- Driver's License (preferable)
- Passport
- Military ID Card
- State Issued ID Card

Give the ID to your Community Manager or Assistant Manager to keep in a drawer for safe keeping while you on your tour. If the prospect questions the procedure, simply let them know that it is company policy and everyone who tours the community is required to do the same. Any prospect that doesn't have or refuses to show proper identification cannot tour the community. If this occurs, you want to end on a positive note by saying that you would still love to show them around your community and ask if they would be willing to retrieve it. Let them know that the drive home will be well worth it!

Section 8.2 Showing an Apartment.

Every minute of the tour is about building a relationship with the prospect. All too often, tours are rushed through with nothing more than a quick walkthrough with obvious observations and a lack of information or demonstration, before heading back to the Leasing Office. You have already evaluated the prospect's needs and have even hopefully gotten some personal background information about your prospective resident. If time, care, personality, and benefit selling are used there's no doubt you'll stand miles above the rest. This is your time to shine, seal the deal, and get the commission!

Before going to the model apartment or other mini-modeled vacant, point out all of your amenities and how they are going to benefit the prospect. "I can't wait for you to see our fitness center. Think about how much money you're going to save by canceling that gym membership!" "You have a playground in your backyard now. No more driving to the crowded local park so your child can swing!" Another amenity that cannot be seen on a community tour, but could easily be the most beneficial tool for your prospective resident is Lennox's partnership with Updater, a one-stop shop for all of their moving needs. With the personalized e-mail your new resident will receive from Updater they will be able turn on their electric, sign up for renter's insurance, change their address with the post office, update their address for magazine

subscriptions, etc. – all from ONE e-mail! No other communities in our markets offer this right now so go ahead and wow your prospect!

When going to the apartment be sure to choose the most attractive route to the apartment(s) you are going to show. If it is a vacant apartment home, you will have already walked to it earlier that morning and will know the best route to take. If it is the model apartment you are going to, don't take the most direct route. Instead, take the scenic tour so can continue to build rapport with the prospect and point out the features that make your community spectacular.

When you enter the apartment, open the door and allow the prospect to enter first. As the prospect enters the apartment say something to give them ownership of the space such as, "Welcome home!" Once in the apartment try to evoke feedback from the prospect regarding each feature explanation. If the prospect doesn't offer feedback or indicate their level of satisfaction, you must be prepared to ask open ended questions to encourage conversation. This allows you to identify the possibility of another apartment that may better meet the prospect's needs. Always ensure that you are taking the lead and maintain control of your demonstration. Walk just in front of the prospect so they can't hurriedly go through the apartment without giving you an opportunity to show them why they're going to love living here. "Get ready for this. Your new kitchen has an 18 cubic-foot refrigerator that produces 50 ice cubes per hour." "Your walk-in closet has 47 linear-feet of hanging storage space. How are you possibly going to fill it all?! Let them touch and feel everything! 20% of people remember something they have seen and 80% of people remember something they have seen, smelled and touched. They may feel uneasy to run their hand across that beautiful granite countertop or open the door to their spacious pantry so engage them to do so. You may want to say something such as, "If you'll open that linen closet door, you will see how much space there is for storage." or "Why don't you open up the patio door and step outside so you can imagine how relaxing it will be to have your morning coffee?" Don't ever point out the obvious like, "This is the living room." They know it's the living room! Instead let them know how they can utilize the space. "This is the spacious living room which can easily accommodate your sofa, loveseat, media center, and even a bookcase!"

If you show an apartment to a couple or roommates, there may be a time when you sense they would like some time alone to discuss the apartment. This situation is quite common and often can help you close the lease. When you sense prospects need some time alone, you might want to comment, "Why don't I step outside for a moment to give you a chance to talk." It may be that they need to discuss finances. There are always things that need to be said between roommates or a couple that they do not feel comfortable saying in front of the Leasing Specialist. Give them some space and just a little time alone and then re-enter the apartment and gain control again.

During the return trip to the Leasing Office, focus the conversation on discussing plans to apply for the apartment, and continue to describe how their life will be once they move in. "Here's where you'll pick up your mail," and "Our office accepts packages delivered by UPS or FedEx, and you'll have a notice like this on your door." Always **Be Closing!**

Tell me, and I may forget. Show me, and I might remember. Involve me, and I'll understand.
Sh

Section 8.3 Things to Avoid.

NEVER:	INSTEAD:
Share personal problems	Talk positively about the prospect
Talk about community problems	Point out positives about the community
Use “security”, “safety”, or “police”	“gated community”, “light audits”
Gossip about residents, employees, vendors, or the competition	Brag on employees, residents and vendors and refrain from negative comments
Walk too fast or hurry a prospect	Take your time and discuss important issues
Make promises you cannot keep	Stick to policy and procedure
Step over a piece of trash	Always pick it up...it makes a good impression
Use slang or profane language	Keep conversation positive and upbeat

9. **OVERCOMING OBJECTIONS**

You know that your community is amazing and the prospect does too, but sometimes not everything will be a perfect fit and you need to arm yourself with all the ammunition necessary to close the deal!

Section 9.1 Defining an Objection.

An objection is defined as any obstacle, however slight, that stands in the way of and prevents a signed lease. Remember though that objections are buying signals. When prospects are involved enough to state an objection, they are interested in the apartment. Naturally, our goal is to remove obstacles, but objections must be understood before they can be removed.

Ultimately as a Leasing Specialist, the first task is to accept that certain features may bring about objections. Next, you must identify all potential objections in order to have solutions prepared for each and every one. Don’t get caught off guard! If the prospect senses you have doubts about the feature you are trying to sell, you run the risk of the prospect not being satisfied with the positive comments and the the prospect will counter with another objection. Once you overcome the objection, the lease is yours!

Section 9.2 The 5 P’s of Objections.

Objections can be summed into 5 basic categories.

1. Private Objection

A private or hidden objection is something the Leasing Specialist “senses.” Because it is not communicated it may be difficult to identify. If you sense a private objection, summarizing the benefits and features again to see if something has been overlooked is a good technique. Other strategies include asking the prospective resident:

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

2. Price Objection

It’s natural for some of us to want more than we can afford. This may be a private or hidden objection because the prospective resident does not want to admit this. You can resolve this objection by emphasizing the value of living in your apartment community. You can enhance value by reviewing the features and benefits that make the apartment home worth the price. Sometimes the price really is out of the prospective resident’s reach. Yet often the apartment home price is within their reach if the Leasing Specialist can convince the prospective resident that money will be saved in other ways, such as a shorter drive to work or no more need to join a private club for pool or fitness use. When a prospective resident states that the rent is too high, you should ask, “How much is too much?” 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.

3. Place Objection

Factors such as work, shopping, school, and recreation make some locations preferable to others. The location of the apartment community cannot be changed, but you can prepare for this objection in advance.

Make sure your presentation lists the benefits of the existing location. Personalize them to each prospective resident. Few locations will satisfy all the needs of all prospective residents. It is a tradeoff. The better you know the needs and wants of your prospective residents, the easier it will be to overcome this objection.

For example, the 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 specific location issues. This way, an appropriate objection recovery statement could be made to address the concern.

4. Prejudice Objection

A prejudice objection reflects an individual'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, the Leasing Professional can prepare for and anticipate objections that may arise.

Example: The successful Leasing Specialist anticipates prejudice objections and deals with them directly. For example, you acknowledge the small square footage of a kitchen by stating, "This is our step saver kitchen." It might be noted that space saved in the kitchen was used to make a larger living area where space was more important. You can also add that a compact kitchen means less cleaning time.

5. 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." You should handle this type of objection carefully.

If the 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. Try to discover when the prospective resident would be ready to make a decision and schedule a follow-up appointment.

By making a statement such as in the following example, a positive sense of urgency can be created:

"It would be nice to have an apartment home of your choosing. While the perfect apartment community probably does not exist, based on everything you have shared, our community comes pretty close."

Section 9.3 Successfully Overcoming Objections.

Listen: So often we leap into answering an objection before we even let the prospect finish explaining what their objection is. Listen to understand and don't jump to conclusions.

Isolate the Objection: "Let me make sure I understand. If the apartment had a washer/dryer, it would be the perfect new apartment home for you and your family?"

Clarify Objection: Be sure you understand exactly what the objection is. Feed it back to the prospect and ask them to elaborate if necessary. Make certain you know just what their concern is. You could create a second objection by not clarifying the first objection.

Indicate Understanding: “I understand...” “I can relate...” “Other people have said the same thing and they have...”

“Cushion” the Objection: “I’m glad you asked that” or “I see what you mean” are great ways to soften your response and encourage your prospect to speak freely. It also validates your confidence in yourself and your product.

Answer with Alternatives: It's our job to show the prospect an alternative to the way they see something. Most people have a tendency to see with "blinders". If you get them to remove those blinders they may see things differently and in your favor.

Present the Other Side: “Consider this...” “Has it occurred to you that...” “What some people have done is...” “I’m glad you mentioned it...”

Overcome the Objection by Showing the Features and Benefits.

Finish with a Bow: After you’ve answered their question and offered an alternative make sure all is well. You’ll want to finish with finesse. Don’t assume they are okay with your alternative. Make statements such as, “What do you think? Will that work?” If they answer “yes”, move on. If they answer “no”, try another approach.

Section 9.4 Determining Your Community’s Objections.

Now that you know how to overcome objections, brainstorm with your team and make a list of the objections you might face at your community along with your solutions.

10. CLOSING THE SALE

Success! You’ve done everything right and have shown the prospect every reason why your community is A+! Now how in the world are you going to get them to move in?

Section 10.1 The Importance of Closing.

Many people believe asking the prospect to lease an apartment is the most difficult aspect of the job. In fact, only 63% of Leasing Specialists ask for the lease. However, if you have been doing everything properly leading up to this final point, the close should come naturally. In actuality, the close began as soon as the prospect walked into the office and was enthusiastically greeted by you. Having someone fill out an application is the ultimate goal of the leasing presentation but it takes several positive steps along the way to reach this point. Just telling someone about the community and apartment is not enough. You must sell the prospect on your community, and show them why your product and service is better than your competitors!

Section 10.2 Closing Techniques.

There are various types of closing techniques that need to be practiced so that you're comfortable when the time comes. Keep in mind that sometimes more than one may be necessary depending on the prospect and the techniques used by the Leasing Specialist.

1. The Summary Close

- This allows you to guide your prospective resident to make a decision by summarizing all the positive points about the apartment and the community that the prospective resident liked. By summarizing the comments made by the prospect, you are able to convince them that this is the apartment he or she needs. The effectiveness of this close depends on how well you listened to your prospective resident.

For example, "Bill, this apartment home is close to the pool where you'll be swimming your laps in the morning. The large living room and fireplace will be great for entertaining on those cold winter nights. And the gray color scheme is the one you said you liked most."

2. The "Personal Invitation" Close

- This should be used in every presentation along with other closes. It basically is a sincere invitation to the prospective resident.

For example: "I know you would be really happy here. It would be a pleasure having you as part of our community."

3. The "Assumption" Close

- This is showing the prospective resident your confidence in your community and that it is not a question of whether they will lease, but which apartment they will move into.

For example: "Let's go take a look at your new apartment home" or "Your new home will only be a short distance from I-95."

4. "Which" Close

- This is an extension of the Assumption Close. The Alternate or Which Close uses opinion gathering questions.

For example: "Which apartment home do you like best, the executive one-bedroom study, or the one bedroom deluxe?"

5. The “Only One” Close

- This close stresses that while this apartment may be the “only” one of its kind that suits all the prospective resident’s needs, you would hate for them to miss out on it.

For example: “Lucille, this is the only luxury one-bedroom apartment I have with the gray carpet and a poolside location. The price will be increasing soon, so it will be to your advantage to sign a one-year lease now to ensure the present rate.”

6. The “Urgency” Close

- This is many times your most effective close. After selecting THE apartment for a prospect, stress the urgency of leasing today, or it may be leased by some else.

For example: “This is the only two-bedroom upstairs with the gray carpet that we have available for your move-in date. Since it suits all your needs, I know you don’t want to wait and risk the chance of someone else leasing it.” Be truthful and this closing technique will not backfire.

7. The “Price Increase Close”

- This is actually another type of the Urgency Close. The price may be increasing or a special is only for this week. If they wait, the rate may be higher.

For example: “The special on this apartment ends this weekend. I would hate to see you miss out on it. If you place a deposit today, you are assured of the best price.”

8. The “Acceptance” Close

- Simply use the psychology that people have a need to be accepted in society. Remind the prospective resident that you have other people that work at the prospective resident’s company and that they will feel right at home in your community. Avoid mentioning a protected class so you do not violate fair housing laws.

For example: “I think you would feel right at home here. Remember there are others from your company that live here too. Let’s go back to the office and get started on your application.”

9. The “Yes” Close

- By asking questions that will obtain a “Yes” response, this close should allow the prospective resident to say “Yes” when they are asked for a deposit.

For example: “Isn’t this a great view? Can you see yourself coming home and relaxing on the patio?”

10. The “Commitment” Close

- This is a good closing technique for prospective residents who have just begun looking for an apartment and feel unsure about making a decision before looking at other apartments. Offer to hold the apartment until 5:00 p.m. that after- noon.

For example: “I would hate to see you miss out on this. I am willing to hold it until 5:00 p.m. with a partial deposit.” Discuss different options with your Community Manager as some communities may not want to offer this.

11. The “48-Hour Hold” Close

- This close simply means holding the apartment for 48 hours or less. Do not use this as your first close!

For example: “By putting down a deposit, I can hold this apartment for 48 hours in order for you to think about your choice. If you decide not to sign a lease here within 48 hours, your deposit is fully refundable.”

12. The “If I Could...Would You” Close

- If there is a particular objection your prospective resident has, get their commitment that they would lease if you could “fix” it.

For example: If the prospective resident says that there is not enough closet space, your reply could be, “If I could get the Service Technician to install additional shelving in this closet, would you lease the apartment today?” Be careful when you use this close to make certain that you can deliver what you promise. This close may also be the solution when a prospective resident presents a prejudice objection, such as the color of the carpet, the level of upgrade, or the date of move in. For example: “If I could locate an apartment home with a view of the courtyard, would you take it?”

13. The “Priority Waiting List” Close

- This is used when a prospective resident is looking out into the future—past the time when you have apartments available. Encourage the prospective resident to still complete an application and leave a deposit. When an apartment becomes available, the prospective resident is promised an apartment home.

14. The “What Did I Miss” Close

- In this close, you ask the prospective resident why they have not made their decision to lease.

For example: “Was there something that I overlooked in your visit today as to why you are hesitating on taking the apartment?” Or “Bill, was there something that I missed that you were looking for today?” If the prospective resident has a hidden objection, they will now identify it, giving you the opportunity to resolve and continue closing.

15. The “Ben Franklin” Close

- Some prospects are very analytical and detail-minded. For these prospects, you must put things in writing. After making mental notes as well as notes on your guest card, sit down with the prospect and list all the pros and cons on a sheet of paper. The pros will always outweigh the cons, and should convince the prospect to lease.

16. “Double-Team” Close

- If the prospect does not lease, use teamwork to get the lease. Introduce the prospect to your Manager, and let the Manager attempt to close the lease again. If the Manager is not available, get another trained Leasing Specialist on your staff to help close.

11. FOLLOW UP

Follow up is one of the most important steps in leasing and is done as a result of one of three reasons. Through follow up you let your prospect know you are sincerely interested and genuinely want them to live at your community. If the prospect has contacted the community via e-mail or a telephone call, follow up is the opportunity to engage them with information about your community to heighten their interest so they ultimately schedule an appointment to tour. If the prospect has visited the community but didn’t apply for an apartment home, follow up is the opportunity to sustain interest or a general commitment. For all follow up, remember to be courteous and always let the prospect know that you are interested. Do not, however, be pushy and infringe on the prospect’s privacy.

Section 11.1 Follow Up After a Telephone Call.

If the prospect has contacted you via telephone there is a great chance that is how they would prefer to continue communicating with you. Best practice, however, is to always ask your prospective resident how they would prefer for you to contact them. Schedule your first follow up through Entrata for 2 days following the initial call and then each week thereafter from the initial date of the call. For example, if they contact your community on April 1st you would want to schedule a follow up for April 3rd, April 8th, April 15th, April 22nd, etc. Continue to follow up until they either schedule an appointment or let you know that they are no longer interested. 80% of sales are made on the fifth to twelfth contact! Be sure to add detailed notes from your conversations into that prospect’s activity log through Entrata to ensure that each time you contact them you are not repeating information.

Section 11.2 Follow Up After an E-mail.

It is imperative that once you receive an e-mail lead you contact them immediately. Leads contacted within 5 minutes are 100 times more likely to close! Follow up for an e-mail lead is scheduled in Entrata exactly as phone follow up in the preceding section. For your convenience, there are generic follow up e-mails set for your community through Entrata that should be sent until you receive a response from your prospect and can communicate specifically about what they are looking for. You can access your pre-prepared e-mails through your lead profile by selecting the e-mail icon followed by the “Responses” drop down icon. Each e-mail is labeled in the order in which it is to be sent and should have the same subject line as the e-mail name.

Section 11.3 Follow Up After a Tour.

If your prospect leaves after a tour without deciding to make your property their new home, you have not lost the lease and opportunities still remain for you! Follow up is the best way to continue to stay in contact with the prospect and keep your community fresh in their mind. Some of the most successful Leasing Specialists rely on follow up to close a lease.

Send a thank you e-mail immediately after the tour through your prepared e-mails as discussed in the previous section. This thank you e-mail includes your gratitude for their visit as well as a link for your prospect so that he or she may complete an online application. Your prospective resident may have just needed to process the information from your thorough tour after leaving. Once they are ready to commit, they can easily access the application from the comfort of their own home. Because you have asked them their preferred method of contact during their tour you can now schedule remaining phone call or e-mail follow ups for the day after their tour and each week following the date of the tour. For example, if your prospective resident toured on April 1st you would schedule follow up for April 2nd, April 8th, April 15th, April 22nd, etc.

12. EXTRA TOOLS FOR SUCCESS

Upon your understanding of this handbook and hands-on training from your Manager you’ll be a pro! The following pages are extra tools for success and must be reviewed/completed to ensure full knowledge. Pages to follow include a Shopper’s Report template of what you will be scored on when mystery shopped, a Community Knowledge Worksheet which needs to be completed and kept close by for reference, and an Orientation Checklist which needs to be checked off and turned in to your Manager no later than 3 weeks after your hire date.

Again, congratulations on your new position and welcome to the Lennox family! Happy leasing!



Shopping Analysis Report Prepared for Sentinel Real Estate

Property Information

Property Name:	Sample Property
----------------	------------------------

Consultant Information

Telephone

Consultant called:	Who did you call?
Date of call:	XX/XX/XX
Time of call:	XX:XX p.m.
Length of call:	2 minutes

On-Site

Consultant shopped:	Who did you shop?
Date of shop:	XX/XX/XX
Time of shop:	XX:XX p.m.
Length on-site visit:	15 minutes

Scoring Information

	Technical Scores		Subjective Scores	
	Earned	Possible	Earned	Possible
Telephone	0	30	0	30
Greeting	0	12	0	20
Identify Needs	0	20	0	20
Demonstration of Community	0	16	0	20
Demonstration of Apartment	0	17	0	20
Closing	0	22	0	20
TOTAL	0	117	0	130
	<i>Compliance</i>	<i>0%</i>	<i>Compliance</i>	<i>0%</i>

	Other Scores	
	Earned	Possible
Appearance of Community	0	13
Apartment Not Available to View	N/A	N/A
Follow-Up	0	3
TOTAL	0	16
	<i>Compliance</i>	<i>0%</i>

Overall Compliance 0.0%

The following twelve (12) pages detail our shopping analysis of your property. Each area is assigned a point total, which is graded by the shopper. Technical grading consists of awarding points if the consultant asked the appropriate questions (Yes/No) or performed the desired task. A "Yes" answer awards the consultant the corresponding point value for that question. The values range from one (1) to three (3) points each. Subjective grading consists of the shopper's opinion regarding the skills of the consultant in various areas. The values range from one (1) to ten (10) points each.

TELEPHONE: SUBJECTIVE

TOTAL POINTS POSSIBLE: 30

Grading scale: Excellent (9-10pts), Above Average (7-8pts), Average (5-6pts)

Below Average (3-4pt), Poor (1-2pts), Unacceptable (0pts)

Enthusiasm/friendliness of the consultant:

Genuine interest in your needs as displayed by the consultant

Product knowledge displayed by the consultant:

Value	Earned
0-10 pts	0
0-10 pts	0
0-10 pts	0
0	

Subjective Compliance 0%

0 out of 30

TELEPHONE: SHOPPER COMMENTS

Enter your comments here.

APPEARANCE OF COMMUNITY

TOTAL POINTS POSSIBLE: 13

1. Did you easily locate the community?
2. Were the main signs clear, visible, and in good repair?
3. Were there adequate signs directing you to the leasing office/information center?
4. Were the grounds you were able to observe, clear of all trash?
5. Were the lawns and landscaping neatly attended to?
6. Was there convenient parking for prospective residents?
7. Was the parking lot in good condition, free of junk cars, trash, and clearly striped?
8. Was the entryway into the information center clean and attractive?
9. Was the leasing office clean, professional and inviting?
10. Did the leasing office convey warmth and seem welcoming?
11. Was your first impression of the community and curb appeal a positive one?
12. Were the walkways or common areas clean and free of personal property?
13. Was the consultant's desk clean and free of clutter?

Value	Earned
(1pt)	0
(1pt)	0
(1pt)	0
(1pt)	0
(1pt)	0
(1pt)	0
(1pt)	0
(1pt)	0
(1pt)	0
(1pt)	0
(1pt)	0
(1pt)	0
0	

Appearance Compliance 0%

0 out of 13

APPEARANCE: SHOPPER COMMENTS

Enter your comments here.

GREETING: TECHNICAL

TOTAL POINTS POSSIBLE: 12

1. Was the shopper greeted or acknowledged immediately after entering the office?
2. Was the shopper offered a seat?
3. Was the consultant dressed and groomed appropriately?
4. Was the shopper greeted in a friendly and enthusiastic manner?
What was the exact greeting? *Example "Welcome to your new home."*
5. Did the office smell fresh, clean, and inviting?
6. Did the consultant ask the shopper's name?
7. Was your name used throughout the conversation?
8. Was the consultant wearing a name tag? Yes No
9. Did the consultant remember your telephone call and have your information readily available?
10. Did the consultant reconfirm your needs?
11. Did the consultant seem fully aware of the apartments that were available?
12. Were you offered refreshments at any time during the visit?
13. Did the consultant make a positive first impression and appear interested in you?
14. If the consultant that you spoke to on the telephone was out, was someone else able to assist you from the information previously obtained from the telephone?
 N/A Yes No

Value	Earned
(1pt)	0
(1pt)	0
(1pt)	0
(1pt)	0

(1pt)	0
(1pt)	0
(1pt)	0

(1pt)	0
(1pt)	0
(1pt)	0
(1pt)	0
(1pt)	0

0

Technical Compliance 0%

0 out of 12

GREETING: SUBJECTIVE

TOTAL POINTS POSSIBLE: 20

Grading scale: Excellent (9-10pts), Above Average (7-8pts), Average (5-6pts)
Below Average (3-4pt), Poor (1-2pts)

Enthusiasm/friendliness of the consultant:
Product knowledge displayed by the consultant:

Value	Earned
0-10 pts	0
0-10 pts	0

0

Subjective Compliance 0%

0 out of 20

GREETING: SHOPPER COMMENTS

Enter your comments here.

IDENTIFYING NEEDS: TECHNICAL

TOTAL POINTS POSSIBLE: 20

1. In what format was the guest card completed? Check the box below.
 Paper guest card Computer/Electronically Guest card not completed

Value	Earned
-------	--------

2. Was the guest card completed by the consultant?

(1pt)	0
-------	---

3. Did the consultant determine how you knew about the community?

(1pt)	0
-------	---

4. Did the consultant obtain and/or complete any of the following information:

- a. Size of apartment desired?
- b. Move-in date?
- c. How many occupants there would be?
- d. Telephone numbers (home, work, cellular)?
- e. Price range or budget?
- f. If you have a pet?
- g. Where you live now or mailing address?
- h. Your current employer?
- i. E-mail address?

(1pt)	0
-------	---

(1pt)	0
-------	---

(1pt)	0
-------	---

(1pt)	0
-------	---

(1pt)	0
-------	---

(1pt)	0
-------	---

(1pt)	0
-------	---

(1pt)	0
-------	---

(1pt)	0
-------	---

5. Did the consultant ask why you were moving?

(1pt)	0
-------	---

6. Did the consultant determine if you had any specific needs or preferences (i.e. location, fireplace, balcony, etc.)?

(1pt)	0
-------	---

7. Did the consultant create a rapport while attempting to identify your needs?

(1pt)	0
-------	---

Explain: **Example: She asked about my job and what a legal secretary does.**

She also commented on my shoes and outfit. She was fashionable herself.

8. Did there seem to be genuine interest in meeting your specific apartment needs?

(1pt)	0
-------	---

9. Were you asked to show any form of identification during the tour?

(1pt)	0
-------	---

10. Did you feel comfortable asking questions and making your needs known?

(1pt)	0
-------	---

11. Did the consultant utilize floor plans/brochures?

(1pt)	0
-------	---

12. Did the consultant offer floor plans/brochures?

(1pt)	0
-------	---

13. Was the consultant pleasant and smooth while gathering the information?

(1pt)	0
-------	---

0

Technical Compliance 0%

0 out of 20

IDENTIFYING NEEDS: SUBJECTIVE

TOTAL POINTS POSSIBLE: 20

Grading scale: Excellent (9-10pts), Above Average (7-8pts), Average (5-6pts)
Below Average (3-4pt), Poor (1-2pts), Unacceptable (0pts)

Listen carefully to the shopper's needs:
Thoroughness in determining the shopper's needs:

Value	Earned
0-10 pts	0
0-10 pts	0
0	

Subjective Compliance 0%
0 out of 20

IDENTIFYING NEEDS: SHOPPER COMMENTS

Enter your comments here.

APARTMENT AVAILABILITY

* To be completed only if NO apartment/model could be viewed.

TOTAL POINTS POSSIBLE: 7

Were you able to view an apartment/model? Yes No

1. If no, did the consultant attempt any of the following:
 - a. Offer an alternative floor plan or ask if the move-in date was flexible?
 - b. Mention professional management?
 - c. Mention on-site management team?
 - d. Discuss and/or offer a tour of the community?
 - e. Discuss the neighborhood facilities?
 - f. Review floor plans by discussing the layout and the apartment features/benefits?
 - g. Overcome objections?

Value	Earned
(1pt)	N/A
(1pt)	N/A
(1pt)	N/A
(1pt)	N/A
(1pt)	N/A
(1pt)	N/A
(1pt)	N/A

N/A

Technical Compliance N/A
0 out of 7

COMMUNITY DEMONSTRATION: TECHNICAL

TOTAL POINTS POSSIBLE: 16

1. Describe the weather conditions at the time of the tour: *It was sunny and clear.*

Value	Earned
(1pt)	0

It was approximately 75 degrees out.

2. Was the consultant eager to show you an apartment/model?
3. Did you take a scenic/convenient route to the apartment/model?

(1pt)	0
(1pt)	0

4. Did the consultant walk beside you rather than in front of you on the way to the apartment/model?
5. Did the consultant know the way to the apartment/model?
6. Did you walk on the sidewalks to the apartment, not crossing the grass?
7. Did the consultant engage in friendly conversation on the way to the apartment/model?
8. Did the consultant seem knowledgeable about the community?
9. Did the consultant mention the on-site management team?
10. Did the consultant mention the professional management?
11. Did the consultant show at least three (3) of the amenities listed below:
 - Laundry Facility
 - Pool
 - Mail Area
 - Playground
 - Tennis Courts
 - Fitness Center
 - Business Center
 - Clubhouse
 - Other

(1pt)	0
(1pt)	N/A
(1pt)	0
(1pt)	0
(1pt)	0
(1pt)	0
(1pt)	0
(3pt)	0

12. If you were not shown amenities, did the consultant describe the amenities?
13. Did the consultant discuss the neighborhood facilities (i.e. shopping restaurants, entertainment) or neighborhood conveniences?
14. Did the consultant spend enough time with you during the demonstration (at least 25 minutes)?
15. Did the consultant point any advantages of living in the community that made a significant or positive impression on you?

(1pt)	0
(1pt)	0
(1pt)	0
(1pt)	0

0

Technical Compliance 0%
0 out of 16

COMMUNITY DEMONSTRATION: SUBJECTIVE

TOTAL POINTS POSSIBLE: 20

Grading scale: Excellent (9-10pts), Above Average (7-8pts), Average (5-6pts)
Below Average (3-4pt), Poor (1-2pts), Unacceptable (0pts)

Positive attitude by consultant:
Thoroughness in explanation/demonstration:

Value	Earned
0-10 pts	0
0-10 pts	0

0

Subjective Compliance 0%
0 out of 20

COMMUNITY DEMONSTRATION: SHOPPER COMMENTS

Enter your comments here.

APARTMENT DEMONSTRATION: TECHNICAL

TOTAL POINTS POSSIBLE: 17

	Value	Earned
1. What type of unit were you shown: <input checked="" type="checkbox"/> Vacant <input type="checkbox"/> Model <input type="checkbox"/> Occupied <input type="checkbox"/> Office Apartment		
2. What apartment number(s) were shown to you? <i>Example: 210B and 208A</i>		
3. Was there an apartment available in the size that you requested?	(1pt)	0
4. What was the consultant's opening statement when entering the apartment? <i>Example: "Here's your new home."</i>		
5. Did the consultant show an apartment/model that was:		
a. Clean	(1pt)	0
b. Lights working and turned on	(1pt)	0
c. Blinds open	(1pt)	0
d. Rent ready	(1pt)	0
e. Comfortable in temperature	(1pt)	0
No, please explain: <i>Example: There were dead bugs all over the kitchen counter.</i>		
6. Were you encouraged to be actively involved in the apartment demonstration (i.e. open doors, drawers, etc.)?	(1pt)	0
7. Was the size, color, etc. of your furniture discussed in relation to the apartment?	(1pt)	0
8. Did the consultant exhibit complete knowledge of the apartment demonstrated?	(1pt)	0
9. Did the consultant review how the apartment features would benefit you? Please explain: <i>Example: She mentioned that it had the fireplace that I wanted.</i>	(1pt)	0
10. Were you asked about your likes and dislikes about the apartment?	(1pt)	0
11. Did the consultant effectively overcome your objections? Please explain: <i>Example: "I understand, you have to look more."</i>	(1pt)	0
12. Did the consultant begin asking closing questions early in the presentation? Please explain: <i>Example: "We'll get the paperwork started."</i>	(1pt)	0
13. Did the consultant conduct the demonstration with control and enthusiasm?	(1pt)	0
14. Did the consultant refrain from using negative terminology?	(1pt)	0
15. Did the consultant use your name during the presentation?	(1pt)	0
16. Did the consultant mention the added value by quoting that utilities were paid by management?	(1pt)	0
		0

Technical Compliance 0%

0 out of 17

APARTMENT DEMONSTRATION: SUBJECTIVE

TOTAL POINTS POSSIBLE: 20

Grading scale: Excellent (9-10pts), Above Average (7-8pts), Average (5-6pts)
Below Average (3-4pt), Poor (1-2pts), Unacceptable (0pts)

Positive attitude by consultant:
Thoroughness in explanation/demonstration:

Value	Earned
0-10 pts	0
0-10 pts	0
	0

Subjective Compliance 0%

0 out of 20

APARTMENT DEMONSTRATION: SHOPPER COMMENTS

Enter your comments here.

CLOSING: TECHNICAL

TOTAL POINTS POSSIBLE: 22

	Value	Earned
1. Did the consultant invite you back to the office, following the tour?	(1pt)	0
2. Did the consultant discuss rental rates and fees positively and confidently?	(1pt)	0
3. Did the consultant invite you to become a resident by renting an apartment?	(1pt)	0
4. Was a sense of urgency created by the consultant when they:		
a. Emphasized that the apartment desired was scarce.	(1pt)	0
b. Emphasized that the specials/incentives would expire soon.	(1pt)	0
5. Did the consultant ask you to leave a deposit or other monetary commitment?	(1pt)	0
6. Did the consultant attempt any of the following closing techniques:		
a. Ask you to fill out an application.	(1pt)	0
b. Ask you to leave a deposit.	(1pt)	0
c. Ask to hold an apartment for you.	(1pt)	0
d. Ask questions that generated yes/no answers (i.e. "Do you like the apartment?" or "Will your furniture fit?", etc.	(1pt)	0
e. Use assumptive phrases (i.e. "Your apartment", "You'll love living here.", etc.	(1pt)	0
f. Ask you to sign a waiting list and/or leave a floating deposit?	(1pt)	0
g. Use a technique not listed above.	(1pt)	0
Please explain: Example: "You'll have a great view of the pool."		
7. What was the reason for not leasing at this time? Example: "I really need to get my husband's opinion."		
8. What was the consultant's response? Example: "I understand getting a second opinion - just don't wait too long."		
9. Did the consultant attempt to arrange another visit to the community?	(1pt)	0
10. Did you feel as though the consultant personally wanted you as a resident?	(1pt)	0
11. Did the consultant remain interested and enthusiastic throughout your visit?	(1pt)	0
12. Did the consultant suggest you visit the community website or company website?	(1pt)	0
13. Describe any specials or incentives that the consultant offered? Example: Free first months rent and a flat screen television.		
14. Did the consultant provide you any of the following marketing materials:		
a. Brochure(s)	(1pt)	0
b. Business card	(1pt)	0
c. Floor plans	(1pt)	0

d. Qualifying criteria

15. Did the consultant do or say anything to make your visit "extraordinarily" memorable?

Please explain:

Example: "She gave me a cool coffee mug."

(1pt)	0
(1pt)	0

0

Technical Compliance 0%

0 out of 22

CLOSING: SUBJECTIVE

TOTAL POINTS POSSIBLE: 20

Grading scale: Excellent (9-10pts), Above Average (7-8pts), Average (5-6pts)

Below Average (3-4pt), Poor (1-2pts), Unacceptable (0pts)

Sales/closing ability displayed by the consultant:

Positive attitude displayed by the consultant:

Value	Earned
0-10 pts	0
0-10 pts	0

0

Subjective Compliance 0%

0 out of 20

CLOSING: SHOPPER COMMENTS

Enter your comments here.

FOLLOW-UP

TOTAL POINTS POSSIBLE: 3

1. Did the consultant follow-up by telephone within 24 hours?

Date called:

XX/XX/XX

Value	Earned
(1pt)	0

2. Did the consultant follow-up in writing within 48 to 72 hours by the following methods?

a. Thank-you note

Date received:

XX/XX/XX

(1pt)	0
(1pt)	0

b. E-mail

Date received:

XX/XX/XX

3. Were you offered an additional special or incentive to lease?

Yes No

0

If yes, what was it?

She indicated that she could include a W/D with the rental.

Technical Compliance 0%

0 out of 3

STRONGEST POINT: CONSULTANT

Enter your comments here.

WEAKEST POINT: CONSULTANT

Enter your comments here.

SHOPPER PROFILE

Shopper name: **Sample Jones**
Name used on telephone: **Sample Jones**
Named used on-site: **Sample Jones**
Address: **11990 June Highway**
City: **Anywhere**
State: **California**
Zip: **38111**
Home phone: **XXX-XX-XXXX**
E-mail address: _____

SHOPPER PREFERENCES

How the shopper learned
about the community? **Just driving by and saw the sign outside**
Number of occupants? **2**
Size of apartment requested? **2 bedroom**
Date needed? **XX/XX/XX**
Any pets? **Yes, a dog**
Reason for moving? **Job promotion**
Special needs or preferences? **I would really like downstairs with a patio.**



Community Knowledge Worksheet

Telephone #: _____ Fax #: _____ Website: _____

General E-mail address: _____

Facebook Name/URL: _____

Twitter Name/URL: _____

Office Hours: Mon. – Fri. _____ Saturday _____ Sunday _____

Community Mgr.: _____ Phone #: _____ E-mail: _____

Asst. Mgr.: _____ Phone #: _____ E-mail: _____

Leasing: _____ Phone #: _____ E-mail: _____

Leasing: _____ Phone #: _____ E-mail: _____

Maint. Super.: _____ Phone #: _____ E-mail: _____

Maint. Tech: _____ Phone #: _____

Maint. Tech: _____ Phone #: _____

Maint. Tech: _____ Phone #: _____

Regional Mgr.: _____ Phone #: _____ E-mail: _____



Community Knowledge Worksheet

Mgt. Company Address: _____

Mgt. Company Phone #: _____ Mgt. Company E-mail: _____

Owner: _____

Other Lennox Communities in the Area:

<u>Community</u>	<u>Phone #</u>	<u>Address</u>
------------------	----------------	----------------

Driving Directions to Community:

From Landmark	Directions



Community Knowledge Worksheet

Neighborhood Information

Schools:

School District: _____ Day Care(s): _____

Elementary: _____ Phone #: _____

Middle: _____ Phone #: _____

High: _____ Phone #: _____

Universities/Colleges: _____

Government:

Local Police Department #: _____ Local Fire Department #: _____

Closest DMV Location: _____ Phone #: _____

Voting Precinct and Voting Location: _____

Transportation:

Public Transportation Available: Yes / No Closest Bus Stop: _____

Taxi Service: _____ Phone #: _____

Taxi Service: _____ Phone #: _____

Airport: _____ Phone #: _____ Distance from Community: _____



Community Knowledge Worksheet

Nearest Supermarket: _____ Nearest Drug Store: _____

Nearest Gas Station: _____ Nearest Hardware/Home Supply: _____

Nearest Discount Retailers: _____

Nearest Convenience Store: _____ Nearest Bank: _____

Nearest Public Park: _____ Nearest Mall: _____

Nearest Hospital: _____ Nearest Library: _____

Nearest Nail Salon: _____ Nearest Barber Shop: _____

Nearest Full-Service Salon: _____ Nearest Spa: _____

Nearest Florist: _____ Nearest Mechanic: _____

Nearest Storage Facility: _____ Nearest Post Office: _____

Nearest Bowling Alley: _____ Nearest Golf Course: _____

Nearest Dog Park: _____ Nearest Emergency Vet: _____

Nearest Vets: _____

Nearest Museums/Art Galleries: _____

Nearest Places of Worship: _____



Community Knowledge Worksheet

Nearest Fine Dining: _____

Nearest Casual Dining: _____

Nearest Fast Food: _____

Nearest Breakfast/Diner: _____

Nearest Coffee Shops: _____

Nearest Delivery Restaurants: _____

Major Employers in the Area: _____

Apartment Amenities

Location(s) of Model Unit: _____

Wall Finish/Colors: _____

Floor Coverings: _____

Cabinetry (color and style): _____ Countertops: _____

Window Coverings Furnished: Yes / No If so, what kind? _____

Patios/Balconies: Yes / No

Pantry: Yes / No

Linen Closet(s): Yes / No



Community Knowledge Worksheet

Walk-in Closets: Yes / No

Ceiling Fan(s): Yes / No

Breakfast Bar: Yes / No

Dishwasher: Yes / No

Fireplace: Yes / No

Garbage Disposal: Yes / No

Hardwood Floors: Yes / No

Intrusion Alarm: Yes / No

Microwave: Yes / No

Vaulted Ceilings: Yes / No

Walk-in Closets: Yes / No

Other Unique Interior Features: _____

Safety Features:

Alarm System: Yes / No

Peep Hole: Yes / No

Fire Extinguisher: Yes / No

Smoke Detectors: Yes / No

Fire Sprinklers: Yes / No

Sound Insulation: Yes / No

Handicap Accessible Units (Features and Unit #'s): _____

Appliances:

Heating/Air Conditioning: _____

Size/Type of Water Heater: _____



Community Knowledge Worksheet

Appliance Brand/Features/Color:

Refrigerator: _____

Range: _____

Dishwasher: _____

Microwave: _____

Disposal: _____

W/D Size (Connections or Included): _____ Rental Cost: _____

Community Amenities

Clubhouse: Yes / No Hours Open: _____ Rental Cost: _____

Game Room: Yes / No Hours Open: _____

Business Center: Yes / No Hours Open: _____

Fitness Center: Yes / No Hours Open: _____

Laundry Room(s): Yes / No Hours Open: _____

Cost to Wash/Dry: _____ # of Washers: _____ # of Dryers: _____

Location(s) of Laundry Rooms: _____



Community Knowledge Worksheet

Pool: Yes / No Hot Tub: Yes / No Kiddie Pool: Yes / No Hours Open: _____

Location(s): _____

Playground: Yes / No Car Care Center: Yes / No Picnic Area: Yes / No

Grill Area: Yes / No Volleyball: Yes / No Tennis Court: Yes / No

Basketball Court: Yes / No Elevator: Yes / No On-Site Patrol: Yes / No

Courtesy Officer: Yes / No Package Acceptance: Yes / No Dog Park: Yes / No

Extra Storage: Yes / No Cost: _____

Carport Garage: Yes / No Cost: _____

Other Community Amenities: _____

Assigned Spaces: Yes / No Recreational Vehicles Allowed (boats, motor homes): Yes / No

Commercial Vans/Trucks Allowed: Yes / No Motorcycles Allowed: Yes / No

of Vehicles Per Resident: _____ Visitor Parking Details: _____

Other Parking Policies: _____



Community Knowledge Worksheet

Utilities

Cable/Satellite Provider: _____ Phone #: _____

Average Monthly Charge: _____

Location(s) of Cable Outlets: _____

Telephone Provider: _____ Phone #: _____

Average Monthly Charge: _____

Location(s) of Phone Outlets: _____

Internet Provider: _____ Phone #: _____

Average Monthly Charge: _____

Location(s) of Outlets: _____

Gas/Electric Company: _____ Phone #: _____

Gas or Electric: _____ Resident Paid: Yes / No

Average Monthly Charge 1 BR: _____ Average Monthly Charge 2 BR: _____

Average Monthly Charge 3 BR: _____ Average Monthly Charge 4 BR: _____



Community Knowledge Worksheet

Water Company: _____ Phone #: _____ Resident Paid: Yes / No

Average Monthly Charge 1 BR: _____ Average Monthly Charge 2 BR: _____

Average Monthly Charge 3 BR: _____ Average Monthly Charge 4 BR: _____

Pest Control Company: _____ Phone #: _____

Resident Paid: Yes / No Average Monthly Charge: _____

Trash Company: _____ Phone #: _____

Resident Paid: Yes / No Average Monthly Charge: _____

Trash Receptacle Locations: _____

Recycling: Yes / No Recycling Receptacle Locations: _____

Current Fees/Deposits/Rents (Subject to Change)

Application Fee: (Per Person) _____ Holding Fee: _____

Administration Fee: _____ Security Deposit: _____

Pet Fee/Deposit: _____ Monthly Pet Rent: _____

Weight Limit/Breed Restrictions/Max # Allowed: _____



Community Knowledge Worksheet

Leasing Information

Lease Terms: _____ Late Rent Fee: _____ Day Rent is Late: _____

NSF Fee: _____ Minimum # of Days for Notice to Vacate: _____

Early Termination Fees: _____

Income Requirements: _____

Occupancy Guidelines (Maximum # of Residents that can Occupy a Unit):

1 Bedroom _____ 2 Bedroom _____ 3 Bedroom _____ 4 Bedroom _____

Are Residents able to Transfer Apartments during or at the End of their Lease: Yes / No

Policy: _____

May Residents add Fans or Light Fixtures? Yes / No

Guidelines: _____

May Residents Paint or Wallpaper their Apartment? Yes / No

Guidelines: _____

Does Maintenance Change Light Bulbs in Apartments: Yes / No

If so, How Often? _____



Community Knowledge Worksheet

Does Maintenance Test Smoke Detectors in Apartments: Yes / No

If so, How Often: _____

Does Maintenance Perform Routine Inspections: Yes / No

If so, How Often: _____

May Residents Change Their Locks: Yes / No

May Deadbolt Locks or Chain Locks Be Added: Yes / No

24-Hour Emergency Maintenance: Yes / No

Does Maintenance Supervisor Live On Site: Yes / No

Emergency Maintenance Number: _____

What is a Maintenance Emergency: _____

Is Renter's Insurance Required: Yes / No

I have completed this Community Knowledge Worksheet satisfactorily and included all up to date information.

Employee Signature/Date

Manager Signature/Date



New Hire Checklist

First Things Are First

- Complete all new hire paperwork.
- Review your schedule with your Community Manager. Check on arrival/departure times, lunch breaks, weekend hours, etc.
- Read and sign Employee Handbook.
- Read Leasing Handbook.
- Read Organizational Policies.

Intro to Your Community

- Meet all employees.
- Tour your office.
- Tour model apartment(s) and vacant apartments.
- Tour community amenities.
- Review your community map to locate all buildings and amenities.
- Learn to drive the golf cart and review golf cart etiquette.
- Complete Community Knowledge Worksheet

Know Your Community

- Review all floorplans and levels of upgrades
- Prepare a presentation kit including:
 - Brochures
 - Pricing Sheet
 - Community Map
 - Rental Applications
 - Community Knowledge Worksheet
- Complete “Entrata Dashboard Overview” training in Entrata.
- Complete “LeadManager Basics” training in Entrata.
- Complete “Lead Alert” training in Entrata.
- Complete “Prospect Portal Basics” training in Entrata.
- Complete “Resident Portal Basics” training in Entrata.
- Complete “Lease Execution Basics” training in Entrata.
- Complete “Message Center” training in Entrata.
- Shop 3 apartment community “comps” and pay close attention to the tour given by the Leasing Specialist. Collect brochures to give to your Community Manager.

- Review qualification requirements for applicants (i.e. credit/background check, income requirements, rental/income verifications, etc.)
- Review Lease Agreement. Practice going over lease with Community Manager.

Learning to Sell Your Community

- Learn the proper way to answer the telephone.
- Listen in on prospect calls for the first 1-2 weeks.
- Role play prospect calls with your Community Manager.
- Fill out test guest cards in Entrata so it will come naturally when it's the "real deal".
- Shadow tours led by another member of your team for the first 1-2 weeks.
- Role play demonstrating an apartment with your Community Manager.
- Learn how to input a guest card from an internet lead.
- Open apartments to be shown for the day with a team member.

Administrative Side of Your Community

- Process a Rental Application with a team member.
- Prepare a Lease Agreement with a team member.
- Learn how to put in a Service Request through Entrata.
- Learn how to do pro-rates. This can be done either with a calculator or a downloaded app to your phone.
- Sit in with a team member while they are completing and setting follow up. Practice while they watch.
- Learn to how to review a resident's ledger so that you can assist with questions when they arise.
- Review procedures with your Community Manager for late rent, NSF checks, early lease termination, skips, etc.

Sell Your Community

- Answer the phone following correct procedures and complete a guest card when a call is received from a prospect. Let your Community Manager listen in.
- Greet and qualify a prospect with your Community Manager nearby.
- Demonstrate an apartment to a prospect while your Community Manager shadows.
- Create guest cards for all internet leads and have your Community Manager check to ensure accuracy.
- Set and begin follow up for all leads upon creation of the guest card (phone, internet, tour) and have your Community Manager check to ensure accuracy.
- Meet with your Community Manager after your first full week of being shadowed. Review any areas that could be improved and ensure you are ready to go it alone.

Moving into Your Community

- Correctly complete preparation of all lease files for all of your move ins for the month.

- Walk apartments the morning before a scheduled a move-in to inspect and leave a welcome package.
- Review lease with new resident and assist with signing.
- Complete a move-in inspection with your new resident.

Market Your Community

- Review a Market Survey with a team member and update for the month.
- Review your renewal program and policies with your Community Manager.
- Assist with completion of Community Newsletter, if applicable.
- Assist in planning of monthly resident event. Create marketing materials, advertise your event, attend, and introduce yourself to residents.
- Accompany a team member while they market to local businesses, universities, etc.
- Assist a team member with a mini-model of a vacant apartment.

I have completed each item of the checklist with approval of knowledge by Community Manager.

Employee Signature/Date

Manager Signature/Date