

# BERNSTEIN PROPERTY MANAGEMENT

## PHONE INQUIRY – DIRECTORY VERIFICATION

# INSTRUCTIONS

## QUESTIONNAIRE

You will call the assigned apartment complex to express interest in renting a unit and schedule an appointment for your assigned shop date. NO visit to the property is required. You will monitor for follow-up for 24 business hours after your submission.

### Before You Begin

- Review your shop confirmation
- Prepare a scenario about your rental needs and ensure the phone number directs you to the correct property.
- Cancel your appointment after submitting, your survey, if applicable, so the location can remove your appointment from their schedule in a timely manner.
- Review photo & receipt requirements

### General Requirements

- **Submission Deadline: 12:00 PM EST two days following your scheduled shop date** (e.g., if scheduled shop date is 1/1/2020, submit your completed survey by 12:00 PM EST on 1/3/2020). This will allow you the 24-hour time period to monitor for follow-up. The deadline is noted in eastern standard time. If your completed survey is not submitted to [shopperhub.cxgroup.com](http://shopperhub.cxgroup.com) by the deadline, it will be automatically cancelled.
- Read all instructions and the entire questionnaire before you complete the shop.
- Answer all questions and provide detailed supporting narrative to explain your responses. Be sure to detail what was said on the phone call.
- Do not reveal your identity as a mystery shopper to anyone at any time.
- If a Quality Assurance Editor contacts you for additional information or clarification about your experience, respond promptly.
- Retain all documentation for six months following your shop.
- You or your immediate family members cannot currently nor have ever worked for or lived at any Bernstein property.
- Failure to follow the specifications for this project as outlined in this document may result in shop cancellation and non-payment.



# Shop Instructions

## Logging Your Call Attempts

For this shop assignment, you must log all your call attempts through our IVR system. Below are instructions to call and log your attempts. Our Quality Assurance team will validate that you called the correct location and the time(s) of your call(s).

**Make sure to have your assignment number, location phone number and information, a pen/paper to note your confirmation code, and the IVR phone number listed below.**

- Call into CX Group's IVR phone system at **866-265-6212** (toll free).
- Once you dial into the IVR system, you will be prompted to enter your assignment number. This can be found on your shop confirmation. Only enter the first series of numbers. For example, if your assignment number is **6448023-3658147**, you would enter **6448023**.
- After entering your assignment number, the system will ask you to dial the phone number you would like to call. Dial the call center phone number found in your shop confirmation (in the Notes & Scenario sections) and follow the prompts. Do not dial a "1" before the area code once in the IVR system.
- **If you receive a recording/voicemail, the call is disconnected, or you get a busy signal, hang up and call back later the same day (all call attempts must be recorded through the IVR).**
- If you get an error message from the IVR when calling the 866 phone number, try calling 617-284-5807 instead (this is an alternate phone number for the IVR).
- You will get an IVR confirmation number during your call. Write down the number and enter it in your report. You will NOT be able to submit your survey without this number.
- **There may be brief pauses between each step of the IVR, do not hang up unless you encounter one of the situations noted above.**

## **Step #1: Call the apartment complex and evaluate the agent's knowledge and invitation to set an appointment.**

- Call on your assigned shop date to learn more about the property and verify the phone number directs you to the correct location (property you are assigned) as indicated in the Notes & Scenario section of your shop confirmation.
  - Be sure to document on your survey the phone number you called to reach the assigned location.
- You must call on a business day (M-F) during business hours.
  - Business hours are 9am-5pm local time, but you must look up the property's hours online before calling to ensure your call attempts are made when they are indicated to be open and staffed.
- Make up to 3 attempts to reach a leasing associate.
  - Calls must be at least 15 minutes apart and within the assigned property's business hours.
  - Do not leave a voicemail on your first or second attempt.
  - If you do not reach someone on your third call attempt document your attempts in your survey.
- DO NOT immediately say that you want to schedule an appointment for a tour.
  - You will present a scenario first and wait to see if the associate offers you to make an appointment.
- During the phone call provide your real name and contact information if asked for it.
- Obtain the name of the leasing associate. If it is not provided during the call or you didn't understand it, ask for

their name at the end of the call.

- During the phone call pose a scenario about why you are considering renting from this complex. For example:
  - Your current lease is almost over, and you are looking for new apartment.
  - Your spouse has been transferred to a location near the apartment complex.
  - You started a new job and want to move to closer work.
  - DO NOT present the scenario that you are selling your home.
  - DO NOT present a scenario that makes it seem like you are not immediately in the market for an apartment (e.g., do not say that your lease is up in 6 months and you are just looking around).
  - DO NOT say that you are looking on behalf of someone else; your scenario MUST be for yourself.
  - DO allow for flexibility in move-in date or apartment size; you will want to see anything that is open or will soon be available. If nothing will be available in the next month or two, DO say that you would like to see anything that is open to see what the community is like, and then ask when something will be open.
  - If asked if you have a pet, say you DO NOT have a pet.
- Evaluate what questions the associate asks to determine your needs.
- Evaluate if the associate describes the features/benefits of the property, amenities, and surrounding area without being prompted (apartment features, quality construction, outstanding neighborhood, etc.).
- Note how the associate presents information (friendly, professional, comfortable, etc.).
- Wait to see if the associate offers to schedule an appointment for a tour. If not, ask at the end of the call. **You MUST attempt to schedule an appointment.**
  - **If an appointment for a tour is scheduled during the call, you must ensure that it is scheduled out at least 10-days in advance to allow time for you to cancel your appointment after you submit your shop. We do not want to impact the agent's tour schedule at the property.**
- Evaluate if the associate offers directions or confirms you know where the property is located.
- When filling out your survey, provide detailed narrative to explain what occurred during your phone call.

**Shops that do not include the required photos/documentation as outlined above will be rejected without payment.**

## BPM PHONE INQUIRY

**Location** 123 Main Street  
N/A, NY 12345

**Shop Details** Shop Date \_\_\_\_\_ Shop Day \_\_\_\_\_  
Start Time \_\_\_\_\_ End Time \_\_\_\_\_  
Dispatch ID 5701346 Shop Type D \_\_\_\_\_

## BPM Phone Inquiry

Number of call attempts you made before connecting with a live leasing associate?	<input type="radio"/> 1 <input type="radio"/> 2	
Date and time of first attempt		
Date and time of second attempt		
Did you connect with an associate who was able to assist you?	<input type="radio"/> Yes <input type="radio"/> No <input type="checkbox"/> N/A – did not reach/speak to a live person	0 / 10
Indicate the name of the associate you spoke with:		
The phone number was to the correct location	<input type="radio"/> Yes <input type="radio"/> No <input type="checkbox"/> N/A - Unknown, unable to ascertain	0 / 10
If the phone number was incorrect, did the associate provide a new or alternate number?	<input type="radio"/> Yes <input type="radio"/> No	
If yes, what was the phone # provided?		
At any point during your call, were you transferred?	<input type="radio"/> Yes <input type="radio"/> No <input type="checkbox"/> N/A – did not reach/speak to a live person	
At any point during your call, were you placed on hold?	<input type="radio"/> Yes <input type="radio"/> No <input type="checkbox"/> N/A – did not reach/speak to a live person	
Phone Associate Offers Warm and Welcoming Greeting	<input type="radio"/> Greeted you in a manner that conveyed courtesy and professionalism using a welcoming remark (i.e. "Hello", "Thanks for calling [property name]", "Good morning", etc.) AND offered assistance <input type="radio"/> Greeted you in a manner that was polite/professional using a welcoming remark OR offer of assistance <input type="radio"/> Greeted you in a manner that was unwelcoming, disinterested, or distracted	
Asks For Your Name	<input type="radio"/> Asks for your name and uses it throughout the call <input type="radio"/> Asks for your name and uses it at least once during the call <input type="radio"/> Does NOT ask for your name	
Gathers Customer Information	<input type="radio"/> Gathers key customer information (e.g. Name, email, phone number, how you heard about the property) <input type="radio"/> Does NOT gather key customer information (e.g. Name, email, phone number, how you heard about the property)	
Listens Attentively	<input type="radio"/> Listens attentively/gives undivided attention without interruption (you do not feel rushed) AND allows you to complete your statement of needs (does NOT finish your thought for you or presume he/she knows what is needed without allowing you to finish) <input type="radio"/> Listens but seems distracted by things going on around him/her OR does NOT allow you to complete your statement of needs (finishes your thought for you or presumes he/she knows what is needed without allowing you to finish) <input type="radio"/> Does not listen / appears distracted or unfocused	
Phone Associate Determines Needs	<input type="radio"/> Asks probing open-ended questions (NOT answered with yes/no) to determine your needs (e.g., "When are you looking to move?", "What is most important to you?") <input type="radio"/> Asks closed-ended questions (answered with yes/no) to determine your needs (e.g., "Are you looking to move?") <input type="radio"/> Does NOT ask any questions regarding your needs	

Restates To Ensure Accuracy

- Correctly summarizes his/her understanding of your purchase needs
- Summarizes his/her understanding of your purchase needs BUT misses one or more parts of your stated needs
- Does NOT summarize his/her understanding of your purchase needs OR summary of needs is incorrect

Indicate which of the following questions did the associate ask:

- Apartment size
- Move-in date
- Do you have any pets?
- Occupants
- How did you hear about us?
- Preferences
- Budget
- Other

If Other, please specify:

Thoroughly Describes Location

- Thoroughly describes the features/benefits of the property, amenities, and surrounding area.
- Describes the property, amenities, and surrounding area but uses generic terms - wording is not descriptive or detailed
- Does NOT describe the property, amenities, or surrounding area at all

Invites You In / Sets Up Appointment

- Invites you to come to the property AND attempts to schedule an appointment
- Invites you to come to the property but does NOT attempt to schedule an appointment
- Does NOT invite you to come to the property OR attempt to schedule an appointment

0 / 10

If yes, indicate the date and time of your appointment

Explain the responses you provided above for the questions regarding the phone inquiry.