

BERNSTEIN PROPERTY MANAGEMENT

WEB INQUIRY – DIRECTORY VERIFICATION

INSTRUCTIONS

QUESTIONNAIRE

You will submit a web inquiry to the assigned apartment complex to express interest in renting a unit and evaluate the response and CONFIRM response(s) come from staff at your assigned location (vs a different or sister location). NO visit to the property is required. You will monitor for follow-up for 24 business hours after your submission.



Items to Remember

- Review your shop confirmation
- Prepare a scenario about your rental needs
- Submit inquiry and monitor follow-up received within 24 business hours of submission
- 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 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 indicated on the web inquiry follow up.
- 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

Step #1: Submit a web inquiry to the assigned apartment complex and schedule an appointment to take a tour.

- You must submit your web inquiry 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 submitting your inquiry to ensure your inquiry is made when they are indicated to be open and staffed. This will allow enough time and opportunity for a leasing associate to respond to your inquiry.

Your assigned URL to the location will be indicated on your assignment confirmation page, next to the Website section.

- Fill out the "Contact Us" form in full. This is your web inquiry.
- In your web inquiry provide your real name and contact information.
- In the section where you type your message, you will present a scenario about why you are considering renting a unit from this complex, and express interest in scheduling an appointment.

○ Include at least two potential dates and times for your appointment request, that are at least 10 days out of your web inquiry submission date.

- Review the Scenario in your shop confirmation email.
 - Example scenarios:
 - i. Your current lease is almost over, and you are looking for new apartment.
 - ii. Your spouse has been transferred to a location near the apartment complex.
 - iii. You started a new job and want to move to closer work.
 - iv. DO NOT present the scenario that you are selling your home.
 - v. 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).
 - vi. DO NOT say that you are looking on behalf of someone else; your scenario MUST be for yourself.
 - vii. 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 additional correspondence occurs and you learn that 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.
 - viii. If asked at any point during the web inquiry correspondence if you have a pet, say you DO NOT have a pet.
 - Appointment request examples:
 - i. Can I set up a time to tour a unit?
 - ii. When can I schedule a time to visit the complex and look at an apartment?
 - iii. Can I schedule a visit for [date] to tour the facility?
- Take a screenshot of the "Contact Us" form BEFORE you submit it. Include the date and time stamp and the property information that is shown on the right side of the form.
- You will also need to copy/paste your ENTIRE web inquiry message into your survey form. Be sure to do this or save off the text of your message to do it later, before submitting your inquiry.
- Check that your contact information is correct and click "SEND MY MESSAGE" to submit your inquiry.
- Take a screenshot to show confirmation that your inquiry was sent. Include the date and time stamp.

- Once you have submitted your web inquiry, you MUST attempt to interact with the chatbot feature (by selecting one of the options provided or asking your own questions) and rate your web experience.



Bernie

Hi, my name is Bernie! How may I help you?

Please select an option or ask a question

Schedule Tour
Pricing & Availability
Office Hours
Apply Online
Pet Policy
Amenities
Current Resident

Ask me a question...

Powered by AI. Please see our [Privacy Statement](#).

Step #2: Monitor for a response to your web inquiry for 24 hours.

- Monitor to see if you get a phone call, text, and/or email response within 24 business hours of submitting your inquiry.
- To accurately evaluate the inquiry response, you must wait the full 24-hour timeframe, to evaluate ALL responses received.
- You will evaluate how and when a leasing associate responds AND if the response(s) received come from your assigned property (do not give credit if responses come from another location OR sister property).
- Check spam/junk folders and your voicemail.
- If you receive any email response, you will need to copy/paste the exact response of EACH email received into your survey form.
- If you receive a text response, capture screenshots showing the entire string of communication.
- If you receive a phone call, capture screenshots of the call log showing date and time of call.
- If no response was received, check your junk/spam folders and voicemail to ensure you did not miss any communication. Note in your survey form that you checked these channels of communication.

- **If you are offered the chance to schedule an appointment at any time, you MUST follow up and attempt to book an appointment.**
- **At any time, if an appointment for a tour is scheduled 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 on the agent's tour schedule at the property.**

- After 24 hours have passed since your web inquiry, finish filling out your survey and submit it, even if no follow-up was received.



Photo & Receipt Requirements

FOLLOW-UP SCREENSHOTS:

- Take at least one (1) screenshot of any/all follow-up received, if applicable.
- For phone calls, take a screenshot of your call log showing the phone number, date, time, and length of call.
- For emails and texts, take screenshot(s) to show the entire string of communication.

ADDITIONAL SCREENSHOTS:

- Take a screenshot of the completed "Contact Us" form before you submit your inquiry.
- Take a screenshot to show confirmation of your web inquiry being sent.
- Take a screenshot of any technical issues you experienced (if applicable).
- Upload these additional screenshots in the Shop Validation section of your survey.

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

BPM WEB INQUIRY

Location 123 Main Street
N/A, NY 12345

Shop Details

Shop Date _____ Shop Day _____
Start Time _____ End Time _____
Dispatch ID 5701347 Shop Type D _____

BPM Web Inquiry

Indicate the time you submitted the inquiry:

Indicate the date you submitted the inquiry:

Enter EXACT web address of website where you made your inquiry:

Describe the EXACT scenario you presented / reason for web inquiry (you must copy and paste your entire inquiry in this section, showing both your inquiry and question asked):

Did someone respond to your internet inquiry within 1 business day? (qualifying business days are Monday - Saturday)

☐ Yes ☐ No

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Indicate ALL types of responses received within 1 business day:

- ☐ Personalized/Human Generated Email (contains BOTH your name AND details of your request such as; appointment time/date, community information, etc.)
- ☐ Automated Email (email only includes your name OR answers your inquiry OR includes either)
- ☐ Phone Call Response
- ☐ Text Message Response
- ☐ No Response within 1 business day

Indicate the DATE and TIME of the first PERSONALIZED/HUMAN GENERATED EMAIL response received (contains your name and details your service requested):

Indicate the DATE and TIME of the first AUTOMATED EMAIL response received:

Indicate the DATE and TIME of the first TEXT MESSAGE response received:

Provide screen shots of any text message(s) received (images must show entire text received - provide multiple images if needed):

Indicate the DATE and TIME of the first PHONE CALL response received:

Paste EXACT response of each email received:

Provide screen shots of any email(s) received (images must show entire email received - provide multiple images if needed):

Based on the response(s) you received, were you able to confirm the web address was for the correct location?

☐ Yes ☐ No ☐ N/A - Unknown, unable to ascertain

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Website is easy to navigate

- ☐ Website offers ease of navigation AND professionalism of design/look
- ☐ Website offers ease of navigation OR professionalism of design/look
- ☐ Website is difficult to navigate AND unattractive or unprofessional

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Were you able to quickly find pricing, specials, and apartment details?

☐ Yes ☐ No

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Based on your web experience with the Chatbot, how satisfied are you with your web experience?

- ☐ 1 = Very Dissatisfied
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5
- ☐ 6
- ☐ 7
- ☐ 8
- ☐ 9
- ☐ 10 = Very Satisfied

Please describe your experience with the Chatbot.

Were you able to schedule an appointment using the web inquiry?

- ☐ Yes
- ☐ No

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If yes, indicate the date and time of your appointment

How would you rate the ease of scheduling an appointment from the website?

- ☐ Very difficult
- ☐ Somewhat difficult
- ☐ Neutral: neither easy nor difficult
- ☐ Somewhat easy
- ☐ Very easy

Explain the responses you provided above for the questions regarding your web inquiry.