

BERNSTEIN PROPERTY MANAGEMENT

APARTMENT VISIT + PHONE INQUIRY

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. You will visit the property on your scheduled date and time to take a tour, and evaluate the location appearance and the leasing associate's knowledge. You will monitor for follow-up for 24 hours after.



Before You Begin

- Review your shop confirmation
- Prepare a scenario about your rental needs
- Call property within 24 hours of being assigned to schedule appointment (details below)
- Review photo & receipt requirements



Don't Forget!

- Arrive on time for appointment & bring your ID
- Get names of phone & leasing associates
- Fill out survey progressively (make updates after call, after visit, after follow-up)
- Present a valid scenario & take required photos



Keep Your Survey Updated – *your shop will be subject to cancellation if you do not follow these requirements.*

- You must fill out your survey progressively—immediately after you complete each step (phone call, visit, follow-up)—so that your scheduler can track your shop progress.
- Call the property to schedule your appointment within 24 hours of being assigned to this shop (not including weekends and at least one day in advance of your shop date), i.e., either call the same day you are assigned or the morning of the next business day.
- **You must answer all the questions about your phone call experience AND write detailed narrative within 24 hours of being assigned to this shop (not including weekends), or your shop will be subject to cancellation!**
- Immediately after completing the visit/tour portion of the shop, fill out the visit portion of your survey. This includes answering all questions, uploading all photos, and writing detailed narrative.
- Immediately after the 24-hour follow-up period has passed, finish and submit your survey.

How to Save Your Survey Responses

- Click the orange “NEXT” button to navigate to the next page.
- You will need to answer all questions on a page (even if they are in a different category) in order to proceed to the next page.
- Clicking the orange “NEXT” button is what triggers your responses on that page to save! If you must enter fake data for some questions in order to proceed to the next page, remember to update those responses later when you log back in to update the next category in your survey.

NEXT



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 said on the phone call and during the visit.
- Get a business card, brochure, pricing sheet, etc. to upload with your report (this is your “receipt”).
- Take a selfie photo for shop validation (this is part of your “receipt”).
- Do not reveal your identity as a mystery shopper to anyone at any time.
- Do not say or do anything to limit the opportunity for the associate(s) to perform the behaviors the survey is designed to evaluate.
- Fill out the phone and visit portions of your survey when you complete those steps, so that your scheduler can confirm your shop is in progress. Wait 24 hours after your visit to evaluate follow-up, then submit your completed survey by the deadline.
- 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.
- Children are not allowed to accompany you on this shop.
- You must have a valid ID (driver's license) and bring it with you when you visit the property. You will not be given a tour without valid ID. Make sure the information you provide to the associate on the phone matches your ID.
- 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 schedule an appointment to take a tour.

- Call ASAP after being assigned to this shop. You must call within 24 hours of being assigned to the shop, at least 1 day in advance of your shop date, and NOT on a weekend. The phone call portion of your shop must be completed (with that section of the survey filled out), within 24 hours of being assigned to this shop (not including weekends), so that your scheduler can track that your shop is in progress.
- 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.
- If you are unable to call at least 1 day in advance of your shop date (M-F) during business hours (9am-5pm), contact your scheduler to reschedule this shop. If you discover the leasing office is not open on your call date, also contact your scheduler to reschedule. You must call when the property is 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, then leave a voicemail. You must answer the phone if you get a call-back, then update your survey to reflect the conversation you had and the appointment that was scheduled. A call-back only counts as a call attempt if you are able to answer the phone. If you do not get a call-back, reach out to your scheduler on next step.
 - i. Provide detailed narrative in your survey to explain what occurred on each call attempt (phone kept ringing, reached a voicemail, disconnected number, etc.).

○ DO NOT ATTEMPT TO GO AS A WALK-IN, you MUST have a scheduled appointment for a tour.

- 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. If the associate does not offer to schedule an appointment by the END of the call, THEN ASK if you can schedule an appointment to come in for a tour.
- Review the Scenario in your shop confirmation email. If you are assigned a targeted associate, their name will be indicated in your scenario, and you must schedule your tour with that person. If your scenario does not include a specific associate name, then you may schedule your tour with any available associate.
- During the phone call and the on-site visit, 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 (and throughout your on-site visit), 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 no, ask at the end of the call.
 - Even if the associate indicates there is no availability at the complex, you MUST STILL visit the complex on your assigned shop date and evaluate what you are shown and told about. You can say you'd still like to see what the location is like in case something opens up in the future.
- Evaluate if the associate offers directions or confirms you know where the property is located.
- If, when placing your phone call, you discover that the leasing office is not open on the day you are assigned, schedule a tour for the next future available date when the complex is open. After your call, immediately contact your scheduler to reschedule your shop.
- If the leasing associate contacts you back to indicate your appointment needs to be rescheduled, continue to reschedule for the next future date and time when a leasing associate will be available. After your call, immediately contact your scheduler with the details to reschedule your shop.

Step #2: Visit the apartment complex and take a tour of the property.

- Visit the complex on your assigned shop date for your tour appointment.
 - If you have a scheduled appointment, arrive on time (not more than 5 minutes early and not late).
 - Check the location's business hours online ahead of time. Not all properties are open on the weekends. If the property is not indicated to be open on your assigned shop date, contact your scheduler immediately to reschedule your shop.
- If an associate is not there upon arrival, wait at least 20 minutes for someone to return.
 - If no one returns after 20 minutes, call the location and let them know you are waiting and would like to look at the facility and available units. Take a screenshot of your call log (showing the phone number you called, date, and time).
 - Wait 5 minutes after the phone call is made. If no one returns your call or shows up within 5 minutes, you may leave the property. Explain the details in your survey, including how long you waited. You will continue to allow the full 24 hours for any follow-up responses before submitting your survey.
- Remember to bring your ID and be prepared to show it. You will not be given a tour without it. Your name and contact information you provided on the phone must match your identification.
- Remember to use the same scenario during your visit that you used during your phone call.
- Evaluate the location appearance, including parking lot, walkways, landscaping, signage, lobby, front desk, etc.
- Evaluate how the associate leads the conversation (allow them the opportunity to lead), noting how they continue to determine your needs, what information is proactively provided, and what is said to promote the apartment community.
- Evaluate how the associate presents information (friendly, professional, comfortable, etc.).
- Note if the associate asks trial questions throughout the tour (e.g., "Will this work for you?" "Can you see yourself in this space?" etc.).
- Observe the maintenance and cleanliness of the apartment or model unit you tour.
- Express interest in touring any apartment that is available, even if it is not the same floorplan as the one you originally said you wanted.
- Ask an open-ended knowledge question during your visit that allows the associate to answer beyond yes or no, such as:
 - What shopping centers, grocery stores, or gyms are nearby?
 - What kid-friendly amenities does the complex offer?
 - What amenities are included?
 - What safety measures are in place if walking the complex late at night?

Step #3: Evaluate closing techniques.

- Note if the associate explains pricing details, rates, fees, and/or deposit requirements.
- Evaluate if the associate encourages you to fill out an application, but DO NOT actually complete the application.
- **Evaluate if the associate attempts to schedule another visit to the property.**
- **Evaluate if the associate offers one of the following:**
 - **Offers you to join the Future Resident Club (if your move-in date is in the future)**
 - **Offers to find a sister property that has available units that match your needs.**
- DO NOT put down a deposit.

- DO NOT schedule a follow-up visit.
- Provide an objection but without giving a timeline to show you are still interested, such as:
 - I am interested, but I am looking at a few other places.
 - I need to discuss this with my spouse first.
 - I want to think about it.
- Obtain the name of the leasing associate. If it is not provided or you didn't understand it, ask at the end of the tour/interaction. The name of the leasing associate is required for your shop to be valid.
- Request a business card, brochure, pricing sheet, etc. from the associate—you will need some kind of paper documentation to upload with your survey.
- When filling out your survey, provide detailed narrative to explain what occurred during your visit.

Step #4: Evaluate follow-up communication received.

- DO progressively fill out your survey as you complete each step (i.e., phone call, visit, follow-up) but DO NOT submit your survey immediately following your visit/tour completion. You will need to wait the full 24 hours, to evaluate any follow-up received during this timeframe. (Remember, if your phone number and/or email are requested by the associate on the phone or on-site visit, you must provide valid contact information.)
- You will monitor for phone call, text, or email received within 24 hours after your visit.
 - Respond to follow-up by indicating you found another place and/or are no longer interested, and asked to be removed from their call list.
- Do NOT proactively reach out to the property after your visit. To accurately evaluate follow-up received, you must wait to see if the property contacts you first within the 24-hour timeframe. You can respond to follow-up, but should not initiate contact.
- Capture a screenshot of all follow-up received (email or text should show message received; phone can be a screenshot of the call log showing date and time of call).
- After 24 hours have passed since your visit, finish filling out your survey and submit it, even if no follow-up was received.
 - If no follow-up 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.
- Evaluate your overall experience, including your likelihood to rent from this apartment complex if you were in the market and your likelihood to recommend. Do not score down for factors outside the staff's control.



Photo & Receipt Requirements

LOCATION EXTERIOR:

- Take at least one (1) photo of the location exterior, showing the entire location entrance/outside of the building, including all signage such as banners, window signage, decals, etc.
- At least one photo must include a sign showing the name of the apartment complex.
- Do not take photos in front of any staff.
- You must NOT be visible in these photos.

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.

TAKEAWAY MATERIALS:

- Take at least one (1) photo of the business card, brochure, pricing sheet, etc. that you receive from the leasing associate. Ask if nothing is proactively provided to you.
- Write the shop number on the documentation, in blue or black ink, and upload a PHOTO of that documentation. A scanned image/PDF will NOT be accepted. You must handwrite the shop number in ink.

LOCATION EXTERIOR SELFIE:

- After your visit, discreetly take one (1) selfie-style photo in front of the location exterior.
- This photo MUST show YOU in the picture (selfie-style).
- You should NOT be in the regular location exterior photo that you upload in your survey, but you MUST be in the selfie photo that you upload in the Shop Validation section—these are two different pictures.

ADDITIONAL SCREENSHOTS:

- Take a screenshot of your call log showing all call attempts if you were unable to reach a leasing associate to schedule an appointment.
- Take a screenshot of your call log if no one showed up at the property after 20 minutes and you needed to make a follow-up call.
- Upload these additional screenshots in the Shop Validation section of your survey, if applicable.

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



QUESTIONNAIRE

Shop date:

Start time:

End time:

Pre-Visit Call

1. Number of call attempts you made before connecting with a live Leasing Associate?

☐ 1

☐ 2

☐ 3

2. Date and time of first call attempt:

Format response as MM/DD/YYYY hh:mm AM/PM (e.g., 2/10/2025 12:30 PM)

3. Date and time of second call attempt:

Enter N/A (in that exact format) if you reached a leasing associate on your first call attempt. If you made a second call attempt, format response as MM/DD/YYYY hh:mm AM/PM (e.g., 2/10/2025 12:45 PM)

4. Date and time of third call attempt:

Enter N/A (in that exact format) if you reached a leasing associate on your first or second call attempt. If you made a third call attempt, format response as MM/DD/YYYY hh:mm AM/PM (e.g., 2/10/2025 1:00 PM)

5. Indicate the name of the Leasing Associate you spoke with:

6. Phone Associate Offers Warm and Welcoming Greeting

☐ Greeted you in a manner that conveyed courtesy and professionalism using a welcoming remark (e.g., "Hello," "Thanks for calling [property name]," "Good morning," etc.) AND offered assistance (10 points)

☐ Greeted you in a manner that was polite/professional using a welcoming remark OR offer of assistance (5 points)

☐ Greeted you in a manner that was unwelcoming, disinterested, or distracted (0 points)

7. Asks Permission To Place You On Hold

Select N/A if you were not placed on hold.

☐ If necessary to place you on hold, asks for your permission to put you on hold, waits for your answer before doing so, AND thanks you for holding when returning to the phone (10 points)

☐ If necessary to place you on hold, asks for your permission to put you on hold and waits for your answer before doing so OR thanks you for holding when returning to the phone (5 points)

☐ If necessary to place you on hold, does NOT ask for your permission to put you on hold or wait for your answer before doing so AND does NOT thank you for holding when returning to the phone (0 points)

☐ N/A - not placed on hold

8. Asks For Your Name

☐ Asks for your name and uses it throughout the call (10 points)

☐ Asks for your name or uses it at least once during the call (5 points)

☐ Does NOT ask for your name (0 points)

9. Gathers Customer Information

- ☐ Gathers key customer information (e.g., name, email, phone number, how you heard about the property) (10 points)
- ☐ Does NOT gather key customer information (e.g., name, email, phone number, how you heard about the property) (0 points)

10. Listens Attentively

- ☐ 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) (10 points)
- ☐ 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) (5 points)
- ☐ Does not listen / appears distracted or unfocused (0 points)

11. Phone Associate Determines Needs

- ☐ 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?") (10 points)
- ☐ Asks closed-ended questions (answered with yes/no) to determine your needs (e.g., "Are you looking to move?") (5 points)
- ☐ Does NOT ask any questions regarding your needs (0 points)

12. Restates To Ensure Accuracy

- ☐ Correctly summarizes his/her understanding of your needs (10 points)
- ☐ Summarizes his/her understanding of your needs BUT misses one or more parts of your stated needs (5 points)
- ☐ Does NOT summarize his/her understanding of your needs OR summary of needs is incorrect (0 points)

13. Which of the following questions or topics did the Leasing Associate ask about?

Select all that apply.

- ☐ Apartment size
- ☐ Move-in date
- ☐ Do you have any pets?
- ☐ Occupants
- ☐ How did you hear about us?
- ☐ Preferences
- ☐ Budget
- ☐ Other
- ☐ No questions asked by the Leasing Associate

14. If Other, indicate question asked:**15. Thoroughly Describes Location**

- ☐ Thoroughly describes the features/benefits of the property, amenities, and surrounding area (10 points)
- ☐ Describes the property, amenities, and surrounding area but uses generic terms - wording is not descriptive or detailed (5 points)
- ☐ Does NOT describe the property, amenities, or surrounding area at all (0 points)

16. Invites You In / Sets Up Appointment

- ☐ Invites you to come to the property AND attempts to schedule an appointment (10 points)
- ☐ Invites you to come to the property but does NOT attempt to schedule an appointment (5 points)
- ☐ Does NOT invite you to come to the property or attempt to schedule an appointment (0 points)

17. Indicate the date and time of your appointment:

Enter N/A (in that exact format) if the leasing associate DID NOT attempt to schedule an appointment. You MUST still ask to schedule an appointment at the end of the call AND proceed with scheduling the appointment, but you will not enter that information here. If the leasing associate DID attempt to schedule an appointment, enter your scheduled appointment time in the format MM/DD/YYYY hh:mm AM/PM (e.g., 2/17/2025 10:00 AM)

18. Did the Leasing Associate offer directions (driving, metro, or parking) to the property?

Select Yes if the leasing associate confirmed you know how to get there.

☐ Yes (10 points)

☐ No (0 points)

19. Phone Associate Expresses Appreciation

☐ Sincerely thanks you AND offers a positive closing remark (e.g., "Thank you, have a great afternoon!") (10 points)

☐ Sincerely thanks you OR offers a positive closing remark (5 points)

☐ Does NOT thank or thank is insincere and does NOT offer a positive closing remark (0 points)

20. Pre-Visit Call Supporting Narrative:

Explain the responses you selected for the Pre-Visit Call questions. Be sure to explain ALL responses of less than full point value. If you were unable to reach a leasing associate after three call attempts, explain what occurred on each call attempt. You must enter between 150 and 1000 characters.

Location Appearance**21. Location Exterior (parking lot, walkways, landscaping, etc.)**

☐ Completely free of litter/debris, inviting, and well-maintained (10 points)

☐ Minor litter/debris or minor attention needed to maintenance (5 points)

☐ Substantial litter/debris or substantial attention needed to maintenance (0 points)

22. Upon arrival, was it easy to see the signage from the street?

☐ Yes (10 points)

☐ No (0 points)

23. Exterior Signage

☐ Signage fully intact and functional (10 points)

☐ Minor attention needed to signage (e.g., damaged signage, bulbs out, etc.) (5 points)

☐ Immediate attention needed to signage (e.g., completely broken or missing altogether) (0 points)

24. Was it easy to find the leasing office when you arrived onsite?

☐ Yes (10 points)

☐ No (0 points)

25. Was it easy to find the "Future Resident Parking" in the parking lot?

Select N/A if the property did not have its own parking lot or parking area.

☐ Yes (10 points)

☐ No (0 points)

☐ N/A - no dedicated parking area

26. Did you take a photo of the location exterior?

Select Yes and then upload your photo(s). The photo(s) must show entire location entrance/outside of the building, including all signage such as banners, window signage, decals, etc.

☐ Yes

☐ No

27. How busy was the location at the time of your arrival?

- ☐ Busy
☐ Somewhat busy
☐ Quiet

28. Lobby

- ☐ All areas of lobby are clean and maintained (floor, mats, rugs, desk, counters, tables) (10 points)
☐ Minor attention needed to lobby (5 points)
☐ Immediate attention needed to lobby (0 points)

29. Front Desk

Select N/A if the location did not have a front desk.

- ☐ Appeared clean and uncluttered (10 points)
☐ Did not appear clean and uncluttered (0 points)
☐ N/A - no front desk at property

30. Location Appearance Supporting Narrative:

Explain the responses you selected for the Location Appearance questions. Be sure to explain ALL responses of less than full point value. You must enter between 150 and 1000 characters.

Leasing Associate Greeting**31. Indicate the name of the Leasing Associate:****32. Indicate the approximate age of the Leasing Associate:**

- | | |
|-------------------------------------|--------------------------------------|
| ☐ 20 or less | ☐ 41 - 45 |
| ☐ 21 - 25 | ☐ 46 - 50 |
| ☐ 26 - 30 | ☐ 51 - 55 |
| ☐ 31 - 35 | ☐ 56 or older |
| ☐ 36 - 40 | |

33. Indicate the gender of the Leasing Associate:

- ☐ Male
☐ Female
☐ Prefer not to answer

34. Was the Leasing Associate wearing glasses?

- ☐ Yes
☐ No

35. Indicate the hair color of the Leasing Associate:

- | | |
|--|--------------------------------------|
| ☐ Auburn/Red | ☐ Brown |
| ☐ Green/Blue/Purple | ☐ Dark Brown |
| ☐ Black | ☐ Gray/White |
| ☐ Blonde | ☐ Shaved/Bald |
| ☐ Light Brown | |

36. Indicate the hair length of the Leasing Associate:

- | | |
|--|---|
| ☐ Short | ☐ Long |
| ☐ Ear Length | ☐ Pulled Back/Up |
| ☐ Shoulder/Collar | ☐ Shaved/Bald |
| ☐ Mid-Back | |

37. Indicate the approximate height of the Leasing Associate:

- | | |
|--------------------------------------|--------------------------------------|
| ☐ 5' or less | ☐ 5'10" |
| ☐ 5'1" | ☐ 5'11" |
| ☐ 5'2" - 5'3" | ☐ 6' - 6'1" |
| ☐ 5'4" - 5'5" | ☐ 6'2" - 6'3" |
| ☐ 5'6" - 5'7" | ☐ 6'4" plus |
| ☐ 5'8" - 5'9" | |

38. Indicate the apparent race of the Leasing Associate:

- | | |
|---|---|
| ☐ African-American | ☐ Middle Eastern or Arab |
| ☐ Caucasian | ☐ Native-American |
| ☐ East Asian | ☐ Other |
| ☐ South Asian | ☐ Prefer not to answer |
| ☐ Hispanic | |

39. Did the Leasing Associate meet you at the leasing office or lobby upon your arrival?

- ☐ Yes (10 points)
☐ No (0 points)

40. Did you have to wait more than 5 minutes?

- ☐ Yes (0 points)
☐ No (10 points)

41. Did the Leasing Associate open the door when you entered or when you exited?

- ☐ Yes (10 points)
☐ No (0 points)

42. Professional Appearance

- ☐ Attire is neat, clean, pressed, professional, well-groomed (10 points)
☐ Appears unprofessional/poorly groomed or appearance is in need of minor attention (5 points)
☐ Appears unprofessional and poorly groomed (0 points)

43. Leasing Associate Offers Warm and Welcoming Greeting

- ☐ Greeted you in a manner that conveyed courtesy and professionalism using a welcoming remark (e.g., "Hello," "Thanks for coming in," "Good morning," etc.) AND offered assistance (10 points)
☐ Greeted you in a manner that was polite/professional using a welcoming remark OR offer of assistance (5 points)
☐ Greeted you in a manner that was unwelcoming, disinterested, or distracted (0 points)

44. Leasing Associate Friendliness

- ☐ Projects a friendly, outgoing attitude and seems to sincerely enjoy assisting you (consistently smiles, makes eye contact, and uses upbeat tone of voice that conveys enthusiasm and energy) (10 points)
☐ Pleasant, polite, and reserved (e.g., uses minimal gestures and a positive, steady tone) (5 points)
☐ Appears to be going through the motions or seems disinterested (0 points)

45. Focuses on You

- ☐ Listens attentively, gives undivided attention without interruption or distraction, and does NOT make you feel rushed (10 points)
☐ Listens but seems distracted by things going on around him/her (5 points)
☐ Does not listen, appears disengaged or unfocused, OR makes you feel rushed (0 points)

46. Determines Needs

- ☐ Asks probing open-ended questions (NOT answered with yes/no) to determine your needs (10 points)
- ☐ Asks closed-ended questions (answered with yes/no) to determine your needs (5 points)
- ☐ Does NOT ask any questions regarding your needs (0 points)

47. Did the Leasing Associate complete a guest card or document your contact information?

- ☐ Yes (10 points)
- ☐ No (0 points)

48. Did the Leasing Associate ask, in a conversational manner, why you were moving?

e.g., "What's leading you to look for a new home today?"

- ☐ Yes (10 points)
- ☐ No (0 points)

49. Leasing Associate Greeting Supporting Narrative:

Explain the responses you selected for the Leasing Associate Greeting questions. Be sure to explain ALL responses of less than full point value. You must enter between 150 and 1000 characters.

Tour**50. Were you able to see a unit with your desired floor plan?**

- ☐ Yes (10 points)
- ☐ No (0 points)

51. If no, explain why not:**52. Did the Leasing Associate provide a tour of the property and amenities?**

- ☐ Yes (10 points)
- ☐ No (0 points)

53. Apartment Cleanliness

- ☐ Apartment was clean, move-in ready, and in great condition (10 points)
- ☐ Apartment was clean with minor damage to items (e.g., scuffs on walls, floor, etc.) (5 points)
- ☐ Apartment was in need of major repairs (e.g., holes in wall, stains on floor, etc.) (0 points)

54. Did the Leasing Associate ask trial questions throughout the apartment tour?

e.g., "Will this work for you?" "Do you like this feature/amenity?" "Can you see yourself in this space?" etc.

- ☐ Yes (10 points)
- ☐ No (0 points)

55. Answers Questions

- ☐ Thoroughly answers your questions AND promotes features and benefits of property being discussed (10 points)
- ☐ Answers your questions but there is room for more detail (5 points)
- ☐ Does NOT answer your questions at all (0 points)

56. Indicate the question you asked:**57. Indicate the Leasing Associate's response:**

58. Demonstrates Knowledge

- ☐ Thoroughly answers questions with detailed responses AND uses language that instills confidence in his/her property knowledge (10 points)
- ☐ Answers questions with basic knowledge, but does not expand on responses; does not instill confidence in his/her knowledge (5 points)
- ☐ Does NOT answer your questions (0 points)

59. Checks For Satisfaction

- ☐ Asks if you have any unanswered questions (10 points)
- ☐ Does NOT ask if you have any unanswered questions (0 points)

60. Overcomes Objections

- ☐ When you provide an objection (price of the unit, not ready to lease yet, etc.) clarifies objection, provides NEW information to emphasize value, AND does so in a way that is comfortable/natural and not pushy (10 points)
- ☐ When you provide an objection (price of the unit, not ready to lease yet, etc.) clarifies objection in a comfortable way BUT does not provide NEW information to emphasize value (5 points)
- ☐ When you provide an objection (price of the unit, not ready to lease yet, etc.), does NOT clarify objection or provide NEW information OR does so in a way that is NOT comfortable/natural or is pushy (0 points)

61. Were there any specific issues with the property appearance that would discourage you from renting a unit?

- ☐ Yes (0 points)
- ☐ No (10 points)

62. If yes, explain in detail any issues with the property appearance:**63. Tour Supporting Narrative:**

Explain the responses you selected for the Tour questions. Be sure to explain ALL responses of less than full point value. You must enter between 150 and 1000 characters.

Leasing Process/Closing**64. Thoroughly Explains Pricing**

- ☐ Leasing Associate explains all applicable pricing and related costs in a clear, understandable way (e.g., rental rates, application fee, deposits, amenity charges) (10 points)
- ☐ Leasing Associate explains all applicable pricing and related costs but information is confusing/vague (5 points)
- ☐ Leasing Associate did NOT explain any pricing and related costs (0 points)

65. Explain in detail what rates, fees, and deposit requirements were explained to you:**66. Did the Leasing Associate create a sense of urgency to lease?**

- ☐ Yes (10 points)
- ☐ No (0 points)

67. Did the Leasing Associate encourage you to complete an application or leave a deposit to reserve an apartment several times throughout the tour?

- ☐ Yes (10 points)
- ☐ No (0 points)

68. Did the Leasing Associate make you feel welcome and that they desired for you to live at the community?

- ☐ Yes (10 points)
- ☐ No (0 points)

69. Was there anything about the leasing process that would hinder you from potentially renting a unit at this location?

- ☐ Yes
☐ No

70. If yes, explain what about the leasing process would hinder you from potentially renting a unit at this location:

71. Did the Leasing Associate attempt to schedule another visit to the property??

- ☐ Yes
☐ No

72. Considering you did not rent the apartment today, were you offered any other alternatives (Sister Property, Competitor Properties, or Future Residents Club)?

- ☐ Yes (10 points)
☐ No (0 points)

73. Leasing Associate Expresses Appreciation

- ☐ Sincerely thanks you for visiting AND offers a positive closing remark (e.g., "Thank you, have a great afternoon!") (10 points)
☐ Sincerely thanks you for visiting OR offers a positive closing remark (5 points)
☐ Does NOT thank you for visiting or thank you is insincere and does NOT offer a positive closing remark (0 points)

74. Leasing Process/Closing Supporting Narrative:

Explain the responses you selected for the Leasing Process/Closing questions. Be sure to explain ALL responses of less than full point value. You must enter between 150 and 1000 characters.

Follow-Up

75. Did you receive any type of follow-up within 24 hours?

- ☐ Yes
☐ No

76. Did the Leasing Associate send any of the following personalized follow ups? (select all that apply)?

Select all types of follow-up communication that you received within 24 hours.

- ☐ Personalized/Human Generated Email (contains both your name and details of your appointment such as Apartments visited, description of your preferences, etc.)
☐ Automated Follow up Email (Only includes your name or thanks you for visiting or both but does not include specific details about your tour)
☐ Phone Call Response
☐ No Response within 24 hours

77. Follow ups sent by the Leasing Associate:

- ☐ Personalized/Human Generated Email OR Phone Call (10 points)
☐ Automated Follow up Email (5 points)
☐ No Response with in 24 hours (0 points)

78. Did the Follow up include a request to complete an application?

- ☐ Yes (10 points)
☐ No (0 points)

79. Date and time of first follow-up received:

Refers to the FIRST follow-up communication received, if you received multiple follow-ups. Format response as MM/DD/YYYY hh:mm AM/PM (e.g., 2/18/2025 9:15 AM)

80. Do you have screenshots of the follow-up communication received?

Select Yes and then upload screenshots of ALL follow-up communication received within 24 hours.

- ☐ Yes
☐ No
☐ N/A - did not receive follow-up

81. Follow-Up Supporting Narrative:

Explain the responses you selected for the Follow-Up questions. Be sure to explain ALL responses of less than full point value. If you indicated that you did not receive follow-up, confirm that you checked all channels of communication (including junk/spam folders and voicemail). If you indicated that you did receive follow-up, detail what information was provided during each follow-up communication. You must enter between 150 and 1000 characters.

Overall Experience

82. How would you describe the service provided by the Leasing Associate?

- ☐ The Leasing Associate provided a tour experience that exceeded what is typically offered at other communities (10 points)
☐ The Leasing Associate provided a tour experience that was comparable to other communities (5 points)
☐ The tour experience was below the standard typically provided by other communities. (0 points)

83. If you met other team members during the tour, did the team members work together to assist your tour experience?

- ☐ Other team members assisted, and the team worked together seamlessly to deliver an excellent tour experience. (10 points)
☐ Other team members assisted, and while the experience was not seamless, it was positive overall. (5 points)
☐ Other team members assisted, but the experience was neither seamless nor positive. (0 points)

84. How would you rate your overall experience at this location?

Rate your overall experience with this location, with 0 being an extremely negative experience and 10 being an extremely positive experience.

- | | |
|----------------------------|-----------------------------|
| ☐ 0 | ☐ 6 |
| ☐ 1 | ☐ 7 |
| ☐ 2 | ☐ 8 |
| ☐ 3 | ☐ 9 |
| ☐ 4 | ☐ 10 |
| ☐ 5 | |

85. Based on your experience, how likely are you to RETURN to this location?

Based on this experience and assuming you are in the market to rent an apartment, rate how likely you would be to return to this location to rent a unit, with 0 being not at all likely and 10 being extremely likely.

- | | |
|----------------------------|-----------------------------|
| ☐ 0 | ☐ 6 |
| ☐ 1 | ☐ 7 |
| ☐ 2 | ☐ 8 |
| ☐ 3 | ☐ 9 |
| ☐ 4 | ☐ 10 |
| ☐ 5 | |

86. Based on your experience, how likely would you be to RECOMMEND this location to others?

Based on this experience, rate how likely you would be to recommend this complex to someone who is in the market to rent an apartment, with 0 being not at all likely and 10 being extremely likely.

- | | |
|----------------------------|-----------------------------|
| ☐ 0 | ☐ 6 |
| ☐ 1 | ☐ 7 |
| ☐ 2 | ☐ 8 |
| ☐ 3 | ☐ 9 |
| ☐ 4 | ☐ 10 |
| ☐ 5 | |

87. Indicate any area of opportunity that will allow this location to better serve you OR anything that negatively impacted your experience:

88. Indicate anything that you experienced that made the experience abnormally unique and/or staff went above and beyond:

89. Overall Experience Supporting Narrative:

Explain the responses you selected for the Overall Experience questions. Be sure to explain ALL responses of less than full point value. Do not score down for factors outside the staff's control. You must enter between 150 and 2000 characters.

Shop Validation

90. Enter the Date you completed your apartment visit/tour:

Format response as MM/DD/YYYY (e.g., 2/10/2025)

91. Enter the time you ARRIVED at the apartment complex:

Format response as HH:MM AM/PM (e.g., 12:45 PM)

92. Enter the time you DEPARTED the apartment complex:

Format response as HH:MM AM/PM (e.g., 12:45 PM)

93. Did you obtain takeaway materials?

Select Yes then upload an image of your takeaway materials, e.g., business card, brochure, pricing sheet, etc.

- ☐ Yes
☐ No

94. If you did not obtain any takeaway materials, explain why:

Enter N/A if you uploaded your takeaway materials. If you have any comments about your takeaway materials, include them here.

95. Did you take a location exterior selfie photo?

Select Yes then upload your location exterior selfie.

- ☐ Yes
☐ No

96. If you do not have a location exterior selfie photo, explain why:

Enter N/A if you uploaded your selfie.

97. Do you have any additional screenshots to upload?

Select Yes if you have any of the following screenshots and then upload the images: screenshot of your call log showing all call attempts if you were unable to reach a leasing associate to schedule an appointment; screenshot of your call log if no one showed up at the property after 20 minutes and you needed to make a follow-up call.

- ☐ Yes
☐ No

98. If you do not have additional screenshots, explain why:

Enter N/A if you uploaded additional screenshots or if your shop didn't require additional screenshots. If you have any comments about your additional screenshots, include them here.

99. IVR Call Confirmation Number:

For multiple IVR confirmations, please be sure to include each attempt as a comma-separated number

END OF QUESTIONNAIRE