



**Prepared by:**  
**Ellis Partners in Management Solutions**  
**www.epmsonline.com**  
**888-988-3767**

Authorized By:  
 Company Name:

Special Instructions:

**Telephone**  
 Telephone Professional:  
 Date Called:  
 Time Called:  
 Length of Call:

**On-Site**  
 On-Site Professional:  
 Date Visited:  
 Time Visited:  
 Length of Visit:

**A Note About Our Scoring System**

<a href="#">Technical Score</a>	<b>Excellent</b> 100-95%	<b>Very Good</b> 94-85%	<b>Good</b> 84-75%	<b>Fair</b> 74-65%	<b>Poor</b> 64-0%
<a href="#">Customer Experience Score</a>	<b>Excellent</b> 5 stars	<b>Very Good</b> 4 stars	<b>Good</b> 3 stars	<b>Fair</b> 2 stars	<b>Poor</b> 1 star

**Shopping Report - Technical Score**

	Possible Points	Earned Points	Percentage
<a href="#">Telephone</a>			%
<a href="#">Greeting</a>			%
<a href="#">Identifying Needs</a>			%
<a href="#">Demonstrating</a>			%
<a href="#">Closing</a>			%
<a href="#">Follow-Up</a>			%
OnSite Total			%
<b>Total Score</b>			%

**Customer Experience - Emotional Score**

Met Needs  
 Portrayed Value  
 Customer Service

**Overall Rating**

**Customer Loyalty Score**

Would you recommend? **N/A**

**Ellis Industry Benchmark Averages**

	Shopping Report Benchmark	Customer Experience Benchmark

**Ellis Benchmark Scores (This Report)**

<a href="#">Ellis Shopping Report Multifamily</a>	%
<a href="#">Industry Benchmark</a>	
<a href="#">Ellis Customer Experience Benchmark</a>	

### Executive Summary

.....  
Overall Attitude and Impression of the Leasing Professional:  
.....

Primary Closing Technique Used by the Leasing Professional:  
.....

Why the Prospect Would / Would Not Have Leased Based on the Presentation:  
.....

Strengths of the Leasing Professional's Presentation:  
.....

Leasing Professional's Opportunities to Improve:  
.....

Overall Summary of Experience:

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**Shopper Information**

.....  
Name Given (Telephone):  
.....

Name Given (On-Site):  
.....

Telephone:  
.....

Email address:  
.....

Apartment size:  
.....

Date needed:  
.....

Number of occupants:

Telephone - 100 points possible

Score: 0 | 0.0%

## Other Calls:

01 Did the Leasing Professional answer with the name of the community?  Yes |  No |  N/A 0/3

## Exact Greeting:

02 Did the Leasing Professional identify him/herself?  Yes |  No |  N/A 0/3

03 Did the Leasing Professional obtain your name during the telephone presentation?  Yes |  No |  N/A 0/3

04 Did the Leasing Professional effectively use your name in conversation?  Yes |  No |  N/A 0/3

05 Did the Leasing Professional convey a warm and inviting attitude?  Yes |  No |  N/A 0/3

## Please explain.

**06 Did the Leasing Professional ask for your telephone number?**  Yes |  No |  N/A 0/15

06a Did the Leasing Professional ask for additional contact information?

\* Mailing address  Yes |  No |  N/A

\* Email address  Yes |  No |  N/A

07 Did the Leasing Professional ask how you knew the community?  Yes |  No |  N/A 0/3

08 Did the Leasing Professional determine any of the following? 0/30

a Size apartment  Yes |  No |  N/A 0/5

b Move-in date  Yes |  No |  N/A 0/5

c Number of occupants  Yes |  No |  N/A 0/5

d Pets  Yes |  No |  N/A 0/5

e Price range  Yes |  No |  N/A 0/5

f Specific needs (i.e. w/d connections, up/downstairs, fireplace)  Yes |  No |  N/A 0/5

09 Did the Leasing Professional suggest you visit the community website or company website?  Yes |  No |  N/A

10 Did the Leasing Professional describe apartment features and/or community amenities?  Yes |  No |  N/A 0/3

## Please explain.

11 Did the Leasing Professional create a sense of urgency?  Yes |  No |  N/A 0/3

12 Did the Leasing Professional extend an invitation for you to visit the community?  Yes |  No |  N/A 0/3

**13 Did the Leasing Professional try to set a specific appointment?**  Yes |  No |  N/A 0/15

Please explain.

- 
- 14 Did the Leasing Professional offer directions to the community?  Yes |  No |  N/A 0/3
- 
- 15 Based on the Leasing Professional's presentation, were you motivated to visit the community?  Yes |  No |  N/A 0/10
- 

Telephone Comments:

### Community Information

- |    |  |                              |                             |                              |
|----|--|------------------------------|-----------------------------|------------------------------|
| 01 | Did you easily locate the community?   | <input type="checkbox"/> Yes | <input type="checkbox"/> No |                              |
| 02 | Were the main community signs clear, visible and in good condition?  | <input type="checkbox"/> Yes | <input type="checkbox"/> No |                              |
| 03 | Were there adequate signs directing you to the leasing office/information center?                            | <input type="checkbox"/> Yes | <input type="checkbox"/> No |                              |
| 04 | Were the lawns and landscaping neat and trim, and free of all trash?   | <input type="checkbox"/> Yes | <input type="checkbox"/> No |                              |
| 05 | Was the general appearance of the parking area in good condition and free of trash?                          | <input type="checkbox"/> Yes | <input type="checkbox"/> No |                              |
| 06 | Were the community amenities you saw (i.e. pool, tennis courts, etc.) clean, attractive and well maintained? | <input type="checkbox"/> Yes | <input type="checkbox"/> No | <input type="checkbox"/> N/A |
| 07 | Was the leasing office clean, neat, and orderly?   | <input type="checkbox"/> Yes | <input type="checkbox"/> No |                              |
| 08 | Did the leasing office communicate warmth and welcome?   | <input type="checkbox"/> Yes | <input type="checkbox"/> No |                              |
| 09 | Was your first impression of the community and curb appeal a positive one?                                   | <input type="checkbox"/> Yes | <input type="checkbox"/> No |                              |

Community Comments:

### Greeting - 20 points possible

Score: 0 | 0.0%

- |           |  |                              |                             |                              |
|-----------|--|------------------------------|-----------------------------|------------------------------|
| 01        | Did the Leasing Professional greet you with a smile, or if busy, acknowledge you immediately?                        | <input type="checkbox"/> Yes | <input type="checkbox"/> No | 0/2                          |
| 02        | Did the Leasing Professional stand to greet you?   | <input type="checkbox"/> Yes | <input type="checkbox"/> No | 0/2                          |
| 03        | Did the Leasing Professional shake your hand?  | <input type="checkbox"/> Yes | <input type="checkbox"/> No | 0/2                          |
| 04        | Exact greeting:  |                              |                             |                              |
| 05        | Did the Leasing Professional introduce him/herself?  | <input type="checkbox"/> Yes | <input type="checkbox"/> No | 0/2                          |
| 06        | Did the Leasing Professional obtain your name during the visit?  | <input type="checkbox"/> Yes | <input type="checkbox"/> No | 0/2                          |
| 07        | Did the Leasing Professional continue to use your name in the conversation?  | <input type="checkbox"/> Yes | <input type="checkbox"/> No | 0/1                          |
| 08        | Did the Leasing Professional ask you to sit down?  | <input type="checkbox"/> Yes | <input type="checkbox"/> No | 0/2                          |
| <b>09</b> | <b>Did the Leasing Professional make a positive first impression and appear genuinely interested in helping you?</b> | <input type="checkbox"/> Yes | <input type="checkbox"/> No | 0/5                          |
| 10        | Did the Leasing Professional offer you refreshments?   | <input type="checkbox"/> Yes | <input type="checkbox"/> No | <input type="checkbox"/> N/A |
| 11        | Was the Leasing Professional professionally dressed (i.e. business casual or uniform)?                               | <input type="checkbox"/> Yes | <input type="checkbox"/> No | 0/2                          |

What was the Leasing Professional wearing?

- 
- 12 Did the Leasing Professional wear a nametag?  Yes |  No
- 
- 13 Did the Leasing Professional remember your telephone call?  Yes |  No |  N/A
- 
- 14 Did the Leasing Professional have previous information on you readily available?  Yes |  No |  N/A
- 
- 15 If the phone agent was out, was someone else able to help you from the information previously taken over the phone?  Yes |  No |  N/A
- 

Please explain.

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Greeting Comments:

## Identifying Needs - 20 points possible

Score: 0 | 0.0%

- 01 Was a guest card completed on paper or electronically (i.e. information entered into a computer)?  Yes |  No 0/2
- By whom?
- 02 Did the Leasing Professional determine how you knew the community?  Yes |  No 0/2
- 03 Did the Leasing Professional identify any of the following? 0/8
- a Size apartment  Yes |  No 0/1
- b Move-in date  Yes |  No 0/1
- c Number of occupants  Yes |  No 0/1
- d Telephone number (Home, work and/or cell.)  Yes |  No 0/1
- e Price range or budget  Yes |  No 0/1
- f Pets  Yes |  No 0/1
- g Where you live now or a mailing address  Yes |  No 0/1
- h Email address  Yes |  No 0/1
- 04 Did the Leasing Professional ask why you were moving?  Yes |  No 0/2
- 05 Did the Leasing Professional determine if you had any specific needs or preferences (i.e. location, color, etc.)?**  Yes |  No 0/2
- 06 Did the Leasing Professional create rapport while attempting to determine your needs?  Yes |  No 0/2
- Please explain.
- 07 Did the Leasing Professional request proper identification before taking you to the apartment and/or community?  Yes |  No |  N/A 0/2

Identifying Needs Comments:



**Demonstrating** - 25 points possible

Score: 0 | 0.0%

Did you view an apartment (i.e. model, vacant, occupied, or office apartment, etc.)?  Yes |  No

Please explain.

(Note: Complete Section One ONLY if you were shown an apartment! If you were not shown an apartment, mark ALL questions and explanations in Section One "N/A" and score Section Two instead.)

### Section One

(Score this Section if you VIEWED an apartment)

01 Did the Leasing Professional take control and lead with enthusiasm?  Yes |  No |  N/A 0/2

02 Did the Leasing Professional take a scenic, yet convenient route to the apartment?  Yes |  No |  N/A 0/1

03 Did the Leasing Professional initiate and carry on a friendly conversation as you walked to and from the apartment?  Yes |  No |  N/A 0/2

Please explain.

04 Did the Leasing Professional mention the professional management?  Yes |  No |  N/A 0/2

05 Did the Leasing Professional mention the on-site personnel?  Yes |  No |  N/A 0/1

**06 Did the Leasing Professional discuss and/or point out amenities and facilities of the community?**  Yes |  No |  N/A 0/3

Please explain.

07 Did the Leasing Professional discuss neighborhood facilities (i.e. shopping, restaurants, entertainment) or neighborhood conveniences?  Yes |  No |  N/A 0/1

08 Were you shown:

Model

Occupied

Vacant

Office/Apt

What apartment number(s) were shown to you?

**09 Did the Leasing Professional show an apartment that was clean, made ready, and comfortable in temperature?**  Yes |  No |  N/A 0/3

If not, please explain.

**10 Did the Leasing Professional mention benefits for the apartment features s/he demonstrated?**  Yes |  No |  N/A 0/3

Please list one or more feature that was mentioned and the benefit(s) stated.

11 Did the Leasing Professional get you actively involved in the tour?  Yes |  No |  N/A 0/1

12 Did the Leasing Professional point out advantages you said were important?  Yes |  No |  N/A 0/2

**13 Did the Leasing Professional effectively overcome your objection(s)?**  Yes |  No |  N/A 0/3

Please explain.

14 Did the Leasing Professional begin asking closing questions early in the presentation?  Yes |  No |  N/A 0/1

Please explain.

## Section Two

(Score this Section if you DID NOT view an apartment)

**15 If an apartment was not shown, did the Leasing Professional attempt any of the following?**  Yes |  No |  N/A 0/25

a Offer an alternate floor plan or ask if your move-in date was flexible?  Yes |  No |  N/A 0/4

b Mention professional management?  Yes |  No |  N/A 0/2

c Mention on-site personnel?  Yes |  No |  N/A 0/2

**d Discuss and/or offer a tour of the community amenities?**  Yes |  No |  N/A 0/5

e Discuss the neighborhood facilities?  Yes |  No |  N/A 0/2

**f Review floor plans by discussing the layout and/or apartment features and benefits?**  Yes |  No |  N/A 0/5

**g Overcome objections?**  Yes |  No |  N/A 0/5

Comment on your objection and his/her response:

Demonstrating Comments:

Closing - 30 points possible

Score: 0 | 0.0%

- |           |   |   |            |
|-----------|---|---|------------|
| 01        | Did the Leasing Professional invite you back to the office following the tour of the apartment and/or community?                            | <input type="checkbox"/> Yes   <input type="checkbox"/> No   <input type="checkbox"/> N/A | 0/1        |
| 02        | Did the Leasing Professional discuss rental rates positively and confidently?   | <input type="checkbox"/> Yes   <input type="checkbox"/> No                                | 0/1        |
| <b>03</b> | <b>Did the Leasing Professional ask you to leave a deposit or other monetary commitment (i.e. security deposit, application fee, etc.)?</b> | <input type="checkbox"/> Yes   <input type="checkbox"/> No                                | <b>0/5</b> |
| 04        | Did the Leasing Professional create a sense of urgency?   | <input type="checkbox"/> Yes   <input type="checkbox"/> No                                | 0/2        |
| 05        | Did the Leasing Professional attempt any of the following closes?   |   | 0/8        |
| a         | Ask you to fill out the application?  | <input type="checkbox"/> Yes   <input type="checkbox"/> No                                | 0/4        |
| b         | Ask to hold an apartment for you?   | <input type="checkbox"/> Yes   <input type="checkbox"/> No                                | 0/4        |
| c         | Ask questions that generated a yes/no answer (i.e. "do you like the apartment?", "will your furniture fit?", etc.)?                         | <input type="checkbox"/> Yes   <input type="checkbox"/> No                                | 0/4        |
| d         | Use assumptive phrases (i.e. "your apartment", "you'll love living here", etc.)?  | <input type="checkbox"/> Yes   <input type="checkbox"/> No                                | 0/4        |
| e         | Ask you to sign a waiting list and/or leave a floating deposit (if nothing was available)?  | <input type="checkbox"/> Yes   <input type="checkbox"/> No                                | 0/4        |
| f         | Use a closing technique not listed above?   | <input type="checkbox"/> Yes   <input type="checkbox"/> No                                | 0/4        |

Please specify:

*\*The closes listed above are worth 4 points each; however, a maximum of 8 points is allowed for this question. The leasing consultant must ask 2 of the closes to receive full credit for this question.*

06 What was your reason for not leasing at this time?

What was the Leasing Professional's response?

07 Did the Leasing Professional attempt to schedule another visit to the community?  Yes |  No 0/2

Please explain.

08 Did the Leasing Professional provide you with any promotional materials (i.e. business card, brochure, floor plan, application, and/or qualifying criteria, etc.)?  Yes |  No 0/109 Did the Leasing Professional suggest you visit the community website or company website?  Yes |  No**10 Based on the Leasing Professional's presentation, would you have leased an apartment?**  Yes |  No 0/1011 If unable to meet your needs, did the Leasing Professional refer you to another community?  Yes |  No |  N/A12 Did the Leasing Professional do or say anything to make your visit "extraordinarily" memorable?  Yes |  No

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If so, please explain.

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Closing Comments:

### Fair Housing/Crime Supplement

01 Did the Leasing Professional say or do anything to discourage you from leasing due to any issues that could have been perceived as discriminatory?

02 When you asked one of the following questions or similar:  
 "What type of people live here?"  
 "Do you make exceptions for late rent for people on social security?"  
 "Do you allow grab bars in the bathroom?"  
 "Is the unit wheelchair accessible?"  
 "Do you accept service dogs?", etc.

How did the Leasing Professional respond?

03 When you asked, "What kind of security do you have?" or "Is this a safe area?", how did the Leasing Professional respond?

**Follow-Up** - 5 points possible

**Score:** 0 | 0.0%

01 Did the Leasing Professional follow-up by telephone within 72 hours?  Yes |  No |  N/A 0/3

Date Received:

02 Did the Leasing Professional follow-up in writing within 5 days? 0/2

a Thank you note.  Yes |  No |  N/A

Date Received:

b Email.  Yes |  No |  N/A

Date Received:

## The Customer Experience

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Customer experience plays a vital role in the decision to rent at your community. The customer's experience involves their perceptions and emotions, which are driving factors for action! Meeting needs, perceived value, and customer service contribute to the overall customer experience and help build customer loyalty. The Customer Experience section allows you to celebrate the "WOW" moments (Excellent-Above Average) that took place and focus on improving those areas that lacked a positive emotional connection (Average-Poor). This feedback is a true representation of the real customer — emotions, opinions, and all.

We've designed the Customer Experience section to allow for expression of those subjective, powerful reactions the customer has to their interaction with you. This includes a 1 to 5 star Customer Experience rating for each individual question; a Needs, Value and Service rating for the shop; and an overall Customer Experience rating based on questions 1-9 of the section. These questions are labeled within the section as "Value", "Needs, or "Service". Question 10 - the "loyalty" question - is a key predictor of renewal and recommendation behavior by the customer.







Participating companies are ranked on the Ellis Customer Experience Benchmark quarterly. The Customer Experience piece of the shopping report does not impact the raw score of the shop.

Note: This section is based on the customer's perceptions and is not subject to our shopping dispute resolution process.

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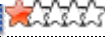

### 1 VALUE: The community amenities struck me as:

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-  **Extraordinary** - cutting edge and beyond my wildest dreams.
-  **Appealing** - the latest and greatest.
-  **Ordinary** - just like they offer next door and down the road
-  **Inferior** - dated and/or in need of repair.
-  **Distressed** - Unacceptable and in failing condition.
-  **N/A** - Not Applicable
- 


### 2 NEEDS: The upkeep of common areas throughout the property was:


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-  **Flawless** - meticulous care and attention to detail... like a vacation resort
-  **Notable** - the community pride was shining through
-  **Acceptable** - what I would expect from a community like this
-  **Deficient** - lacking attention and care
-  **Poor** - I would be embarrassed to live here
-  **N/A** - Not Applicable
- 


### 3 SERVICE: The leasing professional came across as:


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-  **Captivating** - in a league of their own
-

 **Talented** - better than most -- with an added flair of originality

 **Pleasant** - prepared and exhibited a nice personality

 **Robotic** - simply going through the motions

 **Bothered** - made me feel like an interruption


 **N/A** - Not Applicable


4 SERVICE: The level of engagement by the leasing professional was:

 **Outstanding** - like spending an hour talking with my best friend

 **Impressive** - full of energy and creativity


 **Comfortable** - sincere and natural


 **One-Sided** - more focused on selling than getting to know me


 **Disconnected** - did not connect with me


 **N/A** - Not Applicable


5 NEEDS: The leasing professional's attempt to relate the home to my needs and interests was:

 **Superhuman** - never missed a detail... as if reading my mind. Wow!

 **Customized** - genuinely cared about meeting my needs -- making it all about me.


 **Adequate** - tailored to an extent but also general in nature


 **Mediocre** - very little effort made.


 **Unsuccessful** - waste of my time and theirs


 **N/A** - Not Applicable

6 SERVICE: The way the home and community were presented by the leasing professional was:

 **Amazing** - full of energy and creativity... worthy of an Oscar!

 **Admirable** - very natural and engaging

 **Suitable** - a typical sales presentation


 **Fair** - rehearsed and impersonal

 **Unacceptable** - not interested in showing me anything

 **N/A** - Not Applicable

7 NEEDS: Based on my experience, the thought of calling this community home was:


 **Thrilling** - can't wait to pack my bags and move in

 **Comforting** - very happy living here

 **Indifferent** - take it or leave it


 **Short-lived** - a temporary option

 **Unpleasant** - would not live here

 **N/A** - Not Applicable


8 VALUE: What the property offered in exchange for the rental rate was:


 **Exceptional** - can't believe how much you get for your rent

 **Commendable** - an above average deal for the money


 **Reasonable** - a fair value for what I would receive.

 **Tolerable** - not the best value but it might work for awhile


 **Ridiculous** - can't believe they are asking that much rent.

 **N/A** - Not Applicable


9 VALUE: I envision the quality of life here based on the amenities and features offered as:

 **Fabulous** - all other communities fail in comparison

 **Complete** - everything I was looking for


 **Decent** - could make it work


 **Unsatisfied** - shopping for a new place to live

 **Miserable** - would not be happy living here


 **N/A** - Not Applicable

10 LOYALTY: Based on the experience, the likelihood I would recommend the apartment community to family and friends is:

 **Very likely** - would undoubtedly recommend

 **Likely** - would probably recommend

 **Neutral** - might or might not recommend

 **Unlikely** - do not feel confident about recommending

 **Not likely at all** - no way I would recommend

 **N/A** - Not Applicable

Comments:



**SHOPPING REPORT FOLLOW-UP FORM**

Community:	Telephone:	%
Date of Evaluation:	OnSite:	%
Telephone Professional:	Total Score:	%
On-Site Professional:	Customer Experience Score:	
	Shopping Report Benchmark Score:	%

1. What strengths are exhibited in this evaluation?

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2. Which areas are in need of improvement?

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3. What goals have been set to improve these areas?

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4. What training is recommended to improve these areas?

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5. Within what timeframe are these goals/trainings to be completed?

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6. Leasing Professional's comments:

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Did the Leasing Professional record the prospect as traffic?  Yes  No

Did the Leasing Professional conduct appropriate follow-up with the prospect?  Yes  No

Is a follow-up report needed?  Yes  No

If yes, when?

Review completed by: \_\_\_\_\_

Date: \_\_\_\_\_

Leasing Professional's signature: \_\_\_\_\_

Date: \_\_\_\_\_

**PLEASE RETURN THIS COMPLETED FORM TO YOUR REGIONAL MANAGER WITHIN 5 DAYS.**