

Prospect Calls, Greeting & Identifying Needs Checklist

Phone Calls	
	Answer with community name & my name
	Get prospects name & use in conversation
	Ask for prospects phone number
	Ask for additional contact info. (address/e-mail address)
	Ask how they heard about our community
	Determine needs (Size, move-in date, #of occupants, price range, pets, specific needs)
	Suggest they visit community website or company website
	Describe apartment features and/or amenities
	Create a sense of urgency
	Invite them to visit the community
	Try to set a specific appointment
	Offer directions to the community

Greeting	
	Stand & greet with a smile
	Shake their hand
	Introduce yourself
	Get prospects name & use during conversation
	Ask them to sit down (gather additional information)
	Offer refreshments (water, coffee, tea or hot chocolate)
	Professionally dressed & wearing name tag
	Remember phone call & have previous info. On prospect readily available

Identifying Needs	
	Complete guest card
	Determine how they knew about the community
	Identify: size, move-in date, #of occupants, phone#, price range/budget, pets, where they currently live, e-mail address
	Ask why they are moving
	Determine any specific needs or preferences (location, color, etc.)
	Create rapport while determining needs
	Request proper ID before touring community

Prospect Tour, Closing & Follow-Up Checklist

Demonstrating (Tour)

	Show an apartment (clean, made ready & comfortable in temperature)
	Take control & lead with enthusiasm
	Take a scenic, yet convenient route to the apartment
	Initiate & carry on friendly conversation while walking to/from the apartment
	Mention the professional management
	Mention on-site personnel
	Discuss and/or point out amenities & facilities of the community
	Discuss neighborhood facilities (shopping, dining, entertainment & neighborhood conveniences)
	Mention benefits for the apartment features shown
	Get prospect actively involved in the tour
	Point out advantages that prospect said were important
	Effectively overcome objections
	Begin asking closing questions early in the presentation

Closing

	Invite prospect back to the office after the tour
	Discuss rental rates positively & confidently
	Ask prospect to leave a deposit or other monetary commitment (app fee, deposit, etc.)
	Create a sense of urgency
	Attempt the following closes: <ol style="list-style-type: none"> 1. Ask them to fill out application 2. Ask to hold apartment for them 3. Ask questions that generate a yes/no answer (do you like the apartment? will your furniture fit? etc.) 4. Use assumptive phrases (your apartment, you'll love living here, etc.) 5. Ask them to sign a waiting list and/or leave a floating deposit (if nothing was available)
	Ask their reason for not leasing at this time
	Attempt to schedule another visit to the community
	Provide the prospect with any promotional materials (business card, brochure, floor plan, application, and/or qualifying criteria, etc.)
	Suggest that they visit the community or company website

Fair Housing/Crime Supplement

	Don't say or do anything to discourage prospect from leasing due to any issues that could be perceived as discriminatory.
	Be prepared to correctly answer the following questions (or similar) according to Fair Housing <ul style="list-style-type: none"> • 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?
	Be prepared to correctly answer questions regarding security correctly according to Fair Housing. <ul style="list-style-type: none"> • What kind of security do you have? • Is this a safe area?

Prospect Follow-Up

	Follow-up by telephone within 72 hours
	Follow-up in writing within 5 days (Thank you note, email)
	Follow-up with prospect a minimum of 4 times before marking them as 'Lost' in Rent Manager