



## Intro



Date of Call

Location Name

Representative

## Telephone Conversation

How easy was it to locate a phone number to call the property and inquiry about a tour?

- Excellent
- Above Average
- Good
- Below Average
- Poor
- NA

How many rings was your call answered?

- 1-2 rings

- 3-4 rings
- 5-6 rings
- 7+ or no answer

Did the Consultant (Check all that apply under score column)

- Introduce the property
- Introduce themselves with a name
- No answer and no voicemail

If a voicemail was left with the community, was a follow-up call or email returned within 48 hours.

- Yes
- No
- NA

What contact information did the consultant request?

- Name
- Phone Number
- Email Address
- None of these

For the phone response, did the agent (check all that apply under the score column)

- Have a personalized salutation
- Name
- Phone number
- Email address
- Identify the community
- Speak clearly with a professional tone
- Ask if you were interested in touring the community
- Identify who was calling
- Explain location/directions to the community
- Phone response contained none of the above

No response by email

Did the Consultant (Check all that apply under score column)

- Size of Apartment Needed
- Date Apartment Needed
- Number of Occupants
- Ask your budget
- How did you find out about our community
- What is reason for moving
- None of the Above

Did the consultant explain the pet policy?

- Yes
- No
- NA

Did the consultant explain the application criteria and process?

- Yes
- No

Did the consultant explain the fees for applying?

- Yes
- No

Did the consultant describe the apartment and the features?

- Yes
- No

Did the consultant describe the community amenities?

- Yes

No

Did the consultant describe the attractions of the nearest town?

Yes

No

Did the consultant ask if you had any special needs?

Yes

No

Did the consultant quote the price of the apartment?

Yes

No

Did the consultant explain any additional fees in addition to the rent rate?

Yes

No

Did the consultant offer any concessions/specials?

Yes

No

Did the consultant explain the lease terms available?

Yes

No

Did the Consultant set an appointment?

Yes

No

Did the Consultant create a sense of urgency?

- Yes
- No

Did the Consultant suggest a Virtual Tour

- Yes
- No
- NA

**NOTES:**

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