# Prospect Calls, Greeting & Identifying Needs Checklist

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|  | 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 |
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|  | 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 |
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|  | 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

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|  | 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 |
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|  | 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:   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 |
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|  | 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   * 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.   * What kind of security do you have? * Is this a safe area? |

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|  | 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 |