



Cambridge - Conventional Apartment Shop

Location: **Invalid Location: Cannot be blank**

Shopper: Sharpe, Sam [ID: 135625]

Date: / / **Invalid Date: Cannot be blank**

Time: : **Invalid Time: Cannot be blank**

Evaluator(name used):

TELEPHONE INTERVIEW

PERSON EVALUATED:

Day:

DATE:

Time of Call:

: :

GREETING

Friendly and enthusiastic? (required) Yes No N/A
If 'No', what was the greeting.

Introduced name of property? (required) Yes No N/A

Introduced self by name? (required) Yes No N/A

Asked for caller's name? (required) Yes No N/A

Greeting comments: (required)
Comment on number of times called, process to reach target, etc.

QUALIFYING

Identified size of unit needed? (required) Yes No N/A
If 'Yes', what was the size.

Identified date unit needed? (required) Yes No N/A
If 'Yes', what was the date.

Asked number of people to be living in unit? (required) Yes No N/A
If 'Yes', what was the number.

Identified your needs (beyond size & date)? (required) Yes No N/A
If 'Yes', what other needs were identified.

Qualified for pets? (required) Yes No N/A

Asked why moving or relocating? (required)

If 'Yes', what were the reasons given.

Yes No N/A

/

Asked how you heard about property? (required)

If 'Yes', what was the answer.

Yes No N/A

/

HEIGHTENING INTEREST

Described unit's benefits? (required)

If 'Yes', what were the benefits.

Yes No N/A

/

Described property benefits? (required)

If 'Yes', what were the benefits.

Yes No N/A

/

Described community & area benefits? (required)

If 'Yes', what were the benefits.

Yes No N/A

/

Determined your price range? (required)

If 'Yes', what was the method.

Yes No N/A

/

Added value to price (mention specials)? (required)

If 'Yes', what were the added values.

Yes No N/A

/

INVITATION AND DIRECTIONS

Invited you to visit property? (required)

If 'Yes', when.

Yes No N/A

/

Asked for convenient appointment time? (required)

If 'Yes', what was the time.

Yes No N/A

/

Gave clear directions to property? (required)

If 'No', what was unclear with the directions.

Yes No N/A

/

Asked for your telephone number? (required)

Yes No N/A

PROFESSIONALISM

Controlled conversation? (required)

If 'No', what did control the conversation.

Yes No N/A

/

Was natural, not canned? (required)

If 'No', what made it canned.

Yes No N/A

/

Was interested in your needs? (required)

If 'No', what made you feel agent was uninterested.

Yes No N/A

/

Enthused you to visit property? (required)

If 'Yes', what enthused you.

Yes No N/A

/

Thanked for calling; gave friendly "good-bye"? (required)

If 'Yes', what was farewell.

Yes No N/A

In 2-3 sentences, please give a brief overview of the Consultant's performance on the telephone interview: (required)

PROPERTY ASSESSMENT

DATE:

MM/DD/YYYY

Weather Conditions:

OFFICE APPEARANCE

Was the overall appearance and neatness good? (required)

If 'No', what was the appearance.

Yes No N/A

Visual displays (if any) organized? (required)

If 'No', what did the displays look like.

Yes No N/A

Furniture in good repair and coordinated? (required)

If 'No', what was the condition.

Yes No N/A

Was the cleanliness of office desk & surrounding area presentable? (required)

If 'No', what did areas look like.

Yes No N/A

Office staff appearance – neat, clean, professional? (required)

If 'No', what was staff appearance.

Yes No N/A

PROPERTY CONDITIONS

CONDITIONS

Was the conditions of the following neat, clean, free of debris, and in good repair.

Curb appeal	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Entrance	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Signboard	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Banners and/or flags and/or balloons	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Directions to rental/leasing office	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Landscaping	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Clubhouse/cabana	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Other recreational (playground, work-out room)	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Pool area	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Spa and/or sauna	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Vacant unit/s and/or model	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Parking areas	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Mail boxes	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Trash areas	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Laundry	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Overall cleanliness/good repair of property	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A

All properties should have either banners, balloons or flags out in front of their property (or in the vicinity). This question cannot be marked as an N/A, unless you are shopping Gilsan Street/Nordel (because of its location). Be sure to explain in your comments.

Give the numbers and/or the addresses of vacant units and/or models. (required)

//

Detailed comments of property conditions: (required)


//

ON-SITE PRESENTATION


PERSON EVALUATED: (required)

//

Date: (required)

 MM/DD/YYYY


Time of Visit: (required)

 23:45 or 11:45PM or 23:45:11

//

GREETING


If busy, acknowledged you & politely asked you to wait? (required)

 If 'Yes', what was said.

Yes No N/A

//


Gave immediate greeting? (required)

 If 'Yes', what was the greeting.

Yes No N/A

//

Stood to greet you with friendly manner and smile? (required)

 If 'No', what was done.

Yes No N/A

//


Extended hand for handshake? (required)

Yes No N/A

Asked your name? (required)

Yes No N/A


Introduced self to you? (required)

 If 'Yes', what was the introduction.

Yes No N/A

//

Introduced other staff members to you, if present? (required)


 If 'Yes', what was the names of other staff.

Yes No N/A

//

QUALIFYING

Had you complete (or completed) a guest card? (required)

 Did you fill out the guest card or did the consultant?

Yes No N/A

//

Asked (or confirmed) moving time frame? (required)

Yes No N/A

Asked (or confirmed) unit size? (required)

Yes No N/A


Asked (or confirmed) number of occupants? (required)

Yes No N/A

Asked (or confirmed) reason for moving? (required)

Yes No N/A


Inquired about your place of employment or occupation? (required)

 If 'Yes' what was your response?

Yes No N/A

//

Asked (or confirmed) pet ownership? (required)

 If 'Yes' was the pet policy explained?

Yes No N/A

//

Identified your interests/hobbies? (required)

If 'Yes', what was your response?

Yes No N/A

//

DEMONSTRATION

Controlled the tour? (required)

If 'No', what controlled the tour.

Yes No N/A

//

Discussed qualified residents living at property? (required)

If 'Yes', what was discussed.

Yes No N/A

//

Praised professional on-site staff? (required)

If 'Yes', what was the praise.

Yes No N/A

//

Toured all recreation areas? (required)

If 'Yes', what areas did you tour.

Yes No N/A

//

Discussed area conveniences? (required)

If 'Yes', what were conveniences.

Yes No N/A

//

Discussed property benefits? (required)

If 'Yes', what were the benefits.

Yes No N/A

//

Toured model and/or vacant unit/s? (required)

If 'Yes', what were the numbers and/or addresses.

Yes No N/A

//

Demonstrated benefits of unit? (required)

If 'Yes', what were the unit benefits.

Yes No N/A

//

Effectively responded to questions of paid utilities? (required)

If 'Yes', what was the answers.

Yes No N/A

//

Used sales aids (brochure, site map, etc.) effectively? (required)

If 'Yes', what did agent use.

Yes No N/A

//

OVERCOMING OBJECTIONS AND "THE CLOSE"

Created a sense of urgency? (required)

If 'Yes', how did the urgency get created.

Yes No N/A

//

Did Consultant attempted to overcome objections? (required)

*Please list your objection and how they did or did not overcome it. (Example: Furniture would not fit, didn't feel safe, no washer/dryer in unit, etc.) ***If you do not get a chance to view an apartment, please raise an objection about the noise level or safety of the complex"*

Yes No N/A

//

Attempted to close? (required)

If 'Yes', what was the attempt.

Yes No N/A

//

Attempted second close? (required)
If 'Yes', what was the second attempt.

Yes No N/A

//

Asked you to return for another visit? (required)
If 'Yes', what was said.

Yes No N/A

//

Referred you to another property? (required)
If 'Yes', what was the name of property.

Yes No N/A

//

ATTITUDE AND APPEARANCE

Was natural, not canned? (required)

Yes No N/A

Was polite? (required)
If 'No', how was the agent not polite.

Yes No N/A

//

Was service oriented? (required)

Yes No N/A

Projected professional, well-groomed appearance? (required)
If 'No', what was the appearance.

Yes No N/A

//

Built communication throughout presentation? (required)
If 'Yes', what was the technique used.

Yes No N/A

//

Showed genuine interest in your housing needs? (required)
If 'Yes', what interest was shown.

Yes No N/A

//

Demonstrated professional sales skills? (required)
If 'Yes', what were the skills shown.

Yes No N/A

//

Instilled confidence in property management? (required)
If 'Yes', what were the things that installed confidence.

Yes No N/A

//

Followed up with phone call and/or thank you note? (required)
Please indicate the type of follow up received. Follow up must happen within 24-hours of on-site visit. If you receive a card or letter in the mail, it needs to be post-marked the day after the visit at the latest in order to receive points.

Yes No

//

In 2-3 sentences, please give a brief overview of the Consultant's performance on-site presentation: (required)

//

Were Criteria for Residency and Fair Housing posters, posted in a visible location? (required)

Yes No

Were there a "mix" of people living here? (required)
If 'Yes', what was the "mix" of people.

Yes No

//

Were renters called "residents" or "tenants" either on phone or during visit? (required)
If 'Yes', what was used.

Yes No

//


Was complex called "property" or "community" either on phone or during visit? (required)
If 'Yes', what was used.

Yes No

//

Were you offered a "special" ? (required)


Yes No

 *If 'Yes' what was the offer.*

//

Were any comments made that seemed to violate fair housing practices? (required)

Yes No

 *If 'Yes', please explain.*

//

How safe is it here? (required)

 *Please ask the Consultant how safe it is and record their answer below.*

//