



### Cambridge - Tax Credit

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: (required)

Day: (required)  Sunday  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday

Date: (required)

Time of Call:

:  :

### GREETING

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

Introduced name of property? (required)  Yes  No  N/A  
*If 'Yes', what was the name of property.*

Introduced self by name? (required)  Yes  No  N/A  
*If 'Yes' what was the name.*

Asked for caller's name? (required)  Yes  No  N/A  
*If 'Yes', name given.*

Detailed comments for the greeting. (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 given.*

**Identified your needs?** (required)

 *Beyond size & date. If 'Yes', what were other needs.*


Yes  No  N/A

//

**Qualified for pets?** (required)

Yes  No  N/A


**Asked why moving or relocating?** (required)

 *If 'Yes', what was the reason given.*

Yes  No  N/A

//


**Asked how you heard about property?** (required)

 *If 'Yes', what was the answer.*

Yes  No  N/A

//

**Discussed Income Restrictions?** (required)


 *If 'Yes', what were the restrictions.*

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 price.*

Yes  No  N/A

//

**Added value to price?** (required)


 *Mention specials. If 'Yes', what was the added value.*

Yes  No  N/A

//

### INVITATION AND DIRECTIONS


**Invited you to visit property?** (required)

 *If 'Yes', when were you invited.*

Yes  No  N/A

//


**Asked for convenient appointment time?** (required)

 *If 'Yes', what was the appointment time.*

Yes  No  N/A

//

**Gave clear directions to property?** (required)

 *If 'No' what was wrong with directions.*

Yes  No  N/A


//

**Asked for your telephone number?** (required)

Yes  No  N/A

### PROFESSIONALISM

**Controlled conversation?** (required)

 *If 'No', what did have a effect on the conversation.*

Yes  No  N/A

//

Was natural, not canned? (required)

*If 'No', how was the agent canned.*

Yes  No  N/A

Was interested in your needs? (required)

*If 'No' what was done to make you feel this way?*

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 the farewell.*

Yes  No  N/A

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

### PROPERTY ASSESSMENT

DATE: (required)

MM/DD/YYYY

### 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 display look like.*

Yes  No  N/A

Furniture in good repair and coordinated? (required)

*If 'No', what the repair.*

Yes  No  N/A

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

*If 'No', what was the appearance.*

Yes  No  N/A

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

*If 'No', What was staffs appearance.*

Yes  No  N/A

### PROPERTY CONDITIONS

#### PROPERTY CONDITIONS

Were the following items neat, clean, and in good repair?

Curb appeal

Yes  No  N/A

Entrance

Yes  No  N/A

Signboard

Yes  No  N/A

Banners and/or flags and/or balloons

Yes  No  N/A

Directions to rental/leasing office

Yes  No  N/A

Landscaping

Yes  No  N/A

Clubhouse/cabana

Yes  No  N/A

Other recreational (playground, work-out room)

Yes  No  N/A

Pool area

Yes  No  N/A

Spa and/or sauna

Yes  No  N/A

Vacant unit/s and/or model

Yes  No  N/A

Parking areas

Yes  No  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

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

Detailed comments for property assessment. (required)

### ON-SITE PRESENTATION

PERSON EVALUATED: (required)

DATE: (required)

Time of Visit: (required)

 :  : 

Weather Conditions:

### GREETING

- 1. If busy, acknowledged you & politely asked you to wait?** (required)  Yes  No  N/A

*If 'Yes', what was said.*
- 2. Gave immediate greeting?** (required)  Yes  No  N/A

*If 'Yes', what was the greeting.*
- 3. Stood to greet you with friendly manner and smile?** (required)  Yes  No  N/A

*If 'No', what did happen.*
- 4. Extended hand for handshake?** (required)  Yes  No  N/A
- 5. Asked your name?** (required)  Yes  No  N/A

*If 'Yes', what name was given.*
- 6. Introduced self to you?** (required)  Yes  No  N/A

*If 'Yes', what name was given.*
- 7. Introduced other staff members to you, if present?** (required)  Yes  No  N/A

*If 'Yes', what were other staff names.*


### QUALIFYING

- 1. Had you complete (or completed) a guest card?** (required)  Yes  No  N/A

*If 'Yes', who completed the card.*
- 2. Asked (or read) date needed?** (required)  Yes  No  N/A

*If 'Yes' what was the date.*


3. Asked (or read) unit size needed? (required)

 If 'Yes', what was the size.

Yes  No  N/A

//


4. Asked number of people to occupy unit? (required)

 If 'Yes', what was the number given.

Yes  No  N/A

//


5. Identified your reason for moving? (required)

 If 'Yes', what was the reason given.

Yes  No  N/A

//


6. Asked your place of employment or occupation? (required)

 If 'Yes', what was the occupation.

Yes  No  N/A

//


7. Asked if you had pets? (required)

 If 'Yes', what pets did you have if any.

Yes  No  N/A

//


8. Identified your interests and/or hobbies? (required)

 If 'Yes', what were hobbies and interests.

Yes  No  N/A

//

9. Discussed income restrictions? (required)


 If 'Yes', what were the restrictions.

Yes  No  N/A

//

## DEMONSTRATION


1. Controlled the tour? (required)

 If 'No', what effected the tour.

Yes  No  N/A

//


2. Discussed qualified residents living at property? (required)

 If 'Yes', what was discussed.

Yes  No  N/A

//


3. Praised professional on-site staff? (required)

 If 'Yes', What was said.

Yes  No  N/A

//


4. Toured all recreation areas? (required)

 If 'Yes', what were the areas you toured.

Yes  No  N/A

//


5. Discussed area conveniences? (required)

 If 'Yes', what were conveniences.

Yes  No  N/A

//


6. Discussed property benefits? (required)

 If 'Yes', what were the benefits?

Yes  No  N/A

//


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

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

Yes  No  N/A

//

8. Demonstrated benefits of unit? (required)

 If 'Yes', what were the unit benefits?

Yes  No  N/A

//

9. Effectively responded to questions of paid utilities? (required)

*If 'Yes', what was the answers.*

Yes  No  N/A

//

10. Used sales aids effectively? (required)

*If 'Yes' what items were used? (I.e. brochure, site map, etc.)*

Yes  No

//

## OVERCOMING OBJECTIONS AND THE CLOSE

1. Did the Consultant create a sense of urgency? (required)

*If 'Yes', how did the urgency get created?*

Yes  No  N/A

//

2. 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.)*

Yes  No  N/A

//

3. Attempted to close? (required)

*If 'Yes', what was the attempt.*

Yes  No  N/A

//

4. Attempted second close? (required)

*If 'Yes', what was the second attempt.*

Yes  No  N/A

//

5. Asked you to return for another visit? (required)

*If 'Yes', what was said?*

Yes  No  N/A

//

6. Referred you to another property? (required)

*If 'Yes', what was the name of property.*

Yes  No  N/A

//

7. Asked to add you to the waiting list if no apartments are available? (required)

*If 'Yes' what information was taken from you?*

Yes  No  N/A

//

## Attitude and appearance

1. Was natural, not canned? (required)

Yes  No  N/A

2. Was polite? (required)

*If 'No', how was the agent not polite.*

Yes  No  N/A

//

3. Built communication throughout presentation? (required)

*If 'Yes', what was the technique used.*

Yes  No  N/A

//

4. Showed genuine interest in your housing needs? (required)

*If 'Yes', what interest was shown.*

Yes  No  N/A

//

5. Demonstrated professional sales skills? (required)

*If 'Yes', what were the skills shown.*

Yes  No  N/A

//

6. Instilled confidence in property management? (required)

*If 'Yes', what were the things that installed confidence.*

Yes  No  N/A

//

**7. Followed up with phone call and/or thank you note?** (required)

*If 'Yes', what did the follow up come as and how long did it take?*

Yes  No  N/A

//

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

Yes  No

**Accept Section 8?** (required)

*As a general inquiry, ask the consultant if they accept Section 8 and comment on the response.*

Yes  No

//

**Low Income?** (required)

*As a general inquiry, ask the consultant if this is a low income community and comment on the response.*

Yes  No

//

**Ask the apartment staff what type of people live here and record their response.** (required)

*Ask the apartment staff, 'what type of people live here?' and record there response.*

//

**Were renters called "residents" or "tenants" either on phone or during visit?** (required)

*If 'Yes' which term was used?*

Yes  No

//

**Was complex called "property" or "community" either on phone or during visit?** (required)

*If 'Yes' which term was used?*

Yes  No

//

**Were you offered a "special"?** (required)

*If 'Yes' what was the offer.*

Yes  No

//

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

*If 'Yes' please elaborate.*

Yes  No

//

**How safe is it here?** (required)

*Ask and record positive or negative answer?*

Yes  No

//