

Instructor's Guide

Telephone Presentations

NALP 

NATIONAL APARTMENT
LEASING PROFESSIONAL®



NALP **National Apartment Leasing Professional**

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Acknowledgments

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Just for Instructors

The National Apartment Association Education Institute thanks you for your time, talent, and expertise in training and developing the next generation of Leasing Professionals.

Whether you are a subject matter expert or lay person...a seasoned instructor or a new teacher...this guide will help you become an even more engaging and effective trainer.

This education program was developed by Leasing, Operations, Marketing and Training Professionals working in the multifamily housing industry across the nation.

It was developed and revised at the request of Leasing Professionals and apartment association members, like you, who told us what they need to successfully perform their job responsibilities. It was also developed at the request of your managers, supervisors, owners and employers. They asked for this program because of your importance to the industry. They recognize you as the key to leasing, renewing and serving future and current residents of your communities and buildings.

In this course on telephone presentations, you will help Leasing Professionals:

- ▶ Implement good telephone etiquette in the workplace.
- ▶ Apply effective speaking and listening skills to telephone presentations.
- ▶ Be prepared for a telephone presentation.
- ▶ Identify the basic objectives of a telephone contact.
- ▶ Become more comfortable working with current residents.
- ▶ Handle an irate caller.

Although this course is targeted at people with at least six months of leasing experience, it can also be used to teach those who would like to learn more about the telephone presentations of our industry.

For more information about this program or any of NAAEI's education programs, contact your local apartment association or contact NAAEI at 703/518-6141.



Fast Facts: The NALP Telephone Presentations Course

This overview will help familiarize you with the educational approach for this course and ways you can enrich the training for participants.

Course Type

- ▶ Instructor-led classroom training
- ▶ Use short presentations, participant discussions, and learning activities to teach the course material

Course Materials

- ▶ This Instructor's Guide
- ▶ The Telephone Presentations Participant Guide
- ▶ Copies of Diagram A and B (page 27 and 28 in Instructor's Guide)
- ▶ Blank paper—sheets for each participant

Legend:

 *Italics*

Instructional Direction



The NALP Telephone Presentations PowerPoint Presentation includes a slide on this topic

#



#

Instructor's Guide page number (*black/outside*), with corresponding Participant Guide page number (*gray/inside*)



Key pieces of information that will be part of the examination – instructors should focus on these items



Course Length

Approximately four hours

Course Tone

Fast paced, high-energy, experiential, fun

Where this Course Fits in the NALP Curriculum

Telephone Presentations is the second course in the NALP training series. The suggested order for delivery is as follows:

1. Keys to Success in Leasing
2. Telephone Presentations
3. Leasing and the Internet
4. The Leasing Interview
5. Leasing Demonstration and Resolving Objections
6. Rental Policies and Procedures
7. Legal Aspects
8. The Market Survey



Course Schedule-at-a-Glance

Here's a quick look at the topics included in the Telephone Presentations course, the approximate time it will take to teach them, and a suggested schedule.

Training Topic	Length	Suggested Time
Introduction	15 minutes	8:30am–8:45am
Effective Telephone Techniques	60 minutes	8:45am–9:45am
Objectives of Telephone Contact	60 minutes	9:45am-10:45am
Break	15 minutes	10:45am–11:00am
Taking Requests for Service	20 minutes	11:00am–11:20am
Handling Irate Callers	20 minutes	11:20am-11:40am
Fair Housing Implications	20 minutes	11:40am-12:00pm
Summary and Wrap Up	15 minutes	12:00pm-12:15pm



Preparing to Teach the Course

To give course participants a first-rate learning experience, plan to spend several hours preparing to teach this class.

When to Prepare

Depending on your experience with this course, begin preparing one to two weeks before the scheduled course date. That is enough time to absorb the material without feeling rushed.

How to Prepare

- ▶ **Read the Instructor's Guide carefully.** Get familiar with the organization and flow of the course, as well as the content itself.
- ▶ **Look for ways to personalize the instruction.** Add your own stories, examples, and insights. Make the material come alive for the participants.
- ▶ **Mark up this guide.** Write notes throughout. Highlight passages you want to emphasize. Add prompts for your examples and explanations.
- ▶ **Practice.** Do a dry run of the material (or at least some of it) in front of willing colleagues or family members. Get their feedback. Find out: What are you doing well? What is one thing you could improve?
- ▶ **Preview and practice the Covey video activities before class.** Some modules contain activities centered on Franklin Covey teaching videos. Each contains an introduction, the video clip, concept questions, an industry-related activity and a resource sheet. You will need to hit the “next” button to drive the programming through these steps:
 - o *Play the introduction*
 - o *Play the video*
 - o *Click on each of the three concept questions that review the material in the clip*
 - o *Conduct the activity as described in your Instructor's Notes*
 - o *Review the Resource Page provided in the Covey material to close the activity*

When it is Time to Teach the Course

- ▶ **Use this guide.** Refer to it often to keep the class on track. Using notes will make you look natural, relaxed, and yes, even confident.



- ▶ **Approach the course as a conversation, not as a presentation.** Keep things open and easygoing. Pick yourself up if you make a “mistake.” Answer the questions you can. Most important, avoid the temptation to be the expert—simply share what you have learned.
- ▶ **Keep participants actively involved.** Allow participants to ask questions, share ideas with one another, and get as much hands-on experience as possible. Remember: telling is not training.
- ▶ **Be yourself.** Participants appreciate (and learn more from) instructors who are not only knowledgeable, but also approachable, personable, and dedicated.

Preparing the Classroom

To complete your final preparations, arrive at the training site at least one hour before class begins.

Find the Location of these Public Facilities or Services

- ▶ Restrooms
- ▶ Kitchen facilities or vending machines
- ▶ Emergency exits

Prepare Materials

- ▶ This Instructor's Guide (with all your preparation notes in it)
- ▶ Telephone Presentations Participant Guide (one for each participant)
- ▶ Telephone Presentations PowerPoint Slides (these are optional; use them if you wish)
- ▶ Evaluation Forms
- ▶ Sign-in form (to be turned in to the affiliate office after class)

Prepare and Test Equipment

- ▶ Flipchart with stand or whiteboard
- ▶ Markers
- ▶ Microphone or sound system (if needed)
- ▶ Laptop computer with LCD projector (if using PowerPoint slides)

Prepare a Learning-Friendly Classroom

- ▶ Arrange the tables and chairs in the room so that participants will be able to talk with one another, work in small groups, and take notes.
- ▶ Make sure the room is not too hot or cold.
- ▶ Ensure that there is adequate lighting.
- ▶ Write the course agenda on the flipchart or whiteboard.

Welcome and Introduction

- I** *In this brief opening section, you will welcome participants, introduce yourself, and set the stage for the Telephone Presentations course.*



Show Slide 1

- I** *Welcome participants to the course. Introduce yourself to the class and have them briefly introduce themselves. You may choose to conduct an ice breaker or warm-up exercise if necessary. Then, proceed with the script below.*

Dive in...the material is great! And you are going to do just fine, too!



Introduction

This second course in the NALP training series concentrates on Telephone Presentations skills to help you be an effective Leasing Professional. As your position in an organization grows, your knowledge of the industry becomes more important.

In this class, we are going to focus on Telephone skills to strengthen your effectiveness in leasing. When you leave, you will have the tools to work on the areas you have identified for improvement, and therefore improve your bottom line.

I *Turn to page 6 of your Participant Guide, so we can go through the day's agenda, as well as cover a few housekeeping items.*

Ground Rules

- ▶ **Participate fully.** What you get out of this class is fully dependent on what you put into it.
- ▶ **Help us stay on track.** We are going to cover a lot of ground today—at quite a fast pace—and to make sure you get the best training experience, we will need everyone to stay focused.
- ▶ **Have fun.** The amount of learning that will take place is directly proportional to the amount of fun you have.

Questions?

I *Does anyone have any questions about the agenda, the ground rules, or anything else about today's session?*





Show Slides 2 and 3

Course Objectives

At the end of this course, participants will be able to:

- ▶ Implement good telephone etiquette in the workplace.
- ▶ Apply effective speaking and listening skills to telephone presentations.
- ▶ List preparations a Leasing Professional should make for a telephone presentation.
- ▶ Describe the basic objectives of a telephone contact.
- ▶ Develop a process for working with current residents.
- ▶ Handle an irate caller.



i *The following is a Telephone Skills Self-Evaluation for your participants to take as a warm up activity to the class. Have the participants open their books to the evaluation and give them four minutes to complete it. **Let them know this is not a test.** It is strictly for their own information—to evaluate their skill level as they complete the Telephone Presentations course. The desired responses are highlighted in boldface type in the instructor version only.*



Show Slide 4

Telephone Skills Self-Evaluation (Please circle the appropriate answer)

In all telephone conversations:

- | | | |
|---|--------------------------------------|-------------------------------------|
| Do you always answer the telephone with a cheerful greeting? | <input checked="" type="radio"/> Yes | No |
| Do you include your name and the name of your community? | <input checked="" type="radio"/> Yes | No |
| Do you always have writing implements, note pads, and important information at your fingertips? | <input checked="" type="radio"/> Yes | No |
| Do you give the caller your complete and undivided attention? | <input checked="" type="radio"/> Yes | No |
| Do you project a pleasant smile through your voice? | <input checked="" type="radio"/> Yes | No |
| Do you get the caller's name and contact information? | <input checked="" type="radio"/> Yes | No |
| When an interruption occurs, do you give the caller an explanation before you put them on hold? | <input checked="" type="radio"/> Yes | No |
| When asking callers to "hold" do you wait for a response before putting them on hold? | <input checked="" type="radio"/> Yes | No |
| Do you leave the caller on hold for more than 60 seconds at a time? | Yes | <input checked="" type="radio"/> No |
| Do you wait for the caller to hang up the receiver before you do? | <input checked="" type="radio"/> Yes | No |

When speaking to a prospective resident:

Do you create a positive mental picture of your apartment community for callers so that they will want to visit and see it for themselves? Yes No

Do you try to schedule a definite appointment by providing a choice of times? Yes No

Do you find out how the prospective resident heard about your community? Yes No

When accepting a service request:

Do you get the resident's name, address and telephone number, as well as any other pertinent information, such as the type of repair needed? Yes No

Do you try to isolate the nature and exact location of the service problem? Yes No

Do you try to contact the resident if the repairs will be delayed? Yes No

Do you thank the resident for bringing the problem to your attention? Yes No

Do you let the caller know that you will follow through until the problem is solved? Yes No

I *After the participants have completed the evaluation, go through each question quickly, noting the average skill and experience level of your attendees as you discuss the correct answers. Do not engage in lengthy discussions about the correct answers. This is simply a tool to help you assess the participant's skill level and to break the ice for the class. Feel free to revisit the self-evaluation throughout the course as you teach areas covered in the evaluation.*



Reviewing the Course Contents

- I** *After the class is “warmed up,” tell the participants to turn to the Program Objectives and then the Table of Contents of the Participant Guide. Review these as a means for creating enthusiasm and setting expectations. Let participants know you respect their decision to seek training and the commitment they are making to get the most out of the designation program. Let participants know that you expect to learn from them, and that they can learn from each other.*



Show Slide 5

Reviewing Today's Agenda

- I** *At the beginning of the NALP program, review with the participants the agenda for the session, including the objectives, how these will contribute to the goals of the course, and something about the activities the participants will be doing.*

Post the agenda in clear view of the attendees for reference throughout the course.

Tell the participants about housekeeping issues such as:

- ▶ *breaks;*
- ▶ *restrooms;*
- ▶ *where and how they may be able to retrieve messages;*
- ▶ *muting their cell phones;*
- ▶ *no texting during the session;*
- ▶ *the timing of the program topics;*
- ▶ *smoking policies; and*
- ▶ *how you prefer to handle questions and interruptions throughout the course.*



Effective Telephone Techniques



Show Slide 6

Importance of the Telephone

Did you know that 9 out of 10 future residents call first, and the average telephone prospective resident is four times as likely to rent an apartment home as a walk-in prospective resident is? Yet, a survey of hundreds of onsite Leasing Professional Shopping Reports by Ellis Property Management Services indicated that by far the weakest part of the average Leasing Professional's leasing presentation is telephone techniques. Our communities rely on superior telephone skills to entice future residents to visit us; therefore it is critical to develop a strong, persuasive and relationship-building telephone leasing presentation.

It is also important to be able to successfully take a resident service request over the telephone as well as to be able to diffuse an irate resident. The first step to becoming successful at using the telephone is to make certain you have the necessary tools ready.



Show Slides 7 and 8

Preparing for a Telephone Presentation

Telephone Tools:


1. Pens and pencils
2. Note pads, telephone message pads, and blank guest cards

i *Explain to the participants that they will generally gain enough information on the telephone with a prospective resident to begin completion of the Welcome/Guest Card. This can save the prospective resident time when s/he arrives at the community to view their future apartment home.*



3. A calendar for easy reference and to record scheduled appointments
4. An up-to-date list of apartments available to lease
5. Written directions to the community from North, South, East and West for ease in providing directions to telephone prospective residents

1 ***Optional activity:** Ask for a participant volunteer to give you directions from the class location to their community. Discuss how clear and concise their directions were. Would you or the rest of the class have been able to find the community based upon the directions they gave?*

- 
6. Blank service request forms
 7. Frequently called numbers
 8. A positive attitude



Show Slide 9

Projecting Your Professional Image

The telephone is a vital link for the apartment community at large bringing residents, applicants, vendors and others into their offices. Leasing Professionals must project a professional image while using the telephone. To project a professional image, they should:

- ▶ Smile and be enthusiastic. A prospect can hear you smile over the telephone.
- ▶ Speak clearly, and at a pace appropriate to your caller.
- ▶ Do not place your fingers or hand over the mouthpiece while you are speaking.
- ▶ Keep your personal calls to a minimum.
- ▶ Be sincere and courteous to your callers.

Telephone Etiquette



Show Slides 10, 11, and 12

- 1** *Do not let participants underestimate the importance of good telephone etiquette. Provide personal anecdotes for some of the following tips that illustrate the frustration callers experience in some instances and how such frustration will probably weaken the Leasing Professional's chances of getting the caller in for a demonstration.*
1. Answer the call promptly, after the second ring but before the completion of the third ring.
 2. Add warmth to your response by smiling when greeting the caller and being courteous. Do not be too busy to be nice. Be friendly BEFORE you know who it is.
 3. Keep the greeting clean and simple. Long greetings tend to confuse callers.
 4. Identify yourself, both when answering the phone, and during the conversation.
 5. Stop what you are doing and give the caller your undivided attention. In other words, "Learn to say goodbye before you say hello."
 6. Rushing threatens customers. One-word answers make you sound cold and unfriendly. Slow down and take control of the conversation.
 7. Do not carry on additional conversations with others in the office while you are on the telephone.
 8. Do not handle the call while trying to process paperwork, etc. Remember "People before Paperwork." Paper can wait, people should not. Pay immediate attention to the customer.
 9. Do not eat, drink or chew gum while on the telephone.
 10. Put people on hold only after asking them if they mind holding and waiting for their response.



11. Do not leave the caller on hold for longer than thirty seconds. If you must put the caller on hold, check back frequently with them to make certain they can still hold and that they understand the cause for the delay. If you absolutely must call back, give the caller a time frame in which you will call.
12. Always say “thank you.” And, if the prospect thanks you, say “you’re welcome”, not “uh huh” or “it’s ok.”
13. Wait for the caller to hang up before you hang up the telephone.
14. Do not use industry jargon or slang. The caller may not understand or misunderstand. Don’t use “1.1” or “2.2D”.

Improve Your Speaking Skills

Participants should learn to improve their speaking skills in order to improve their performance.



Show Slide 13

- ▶ **Communication is a two-way street**—talking and listening. In this exchange, both parties must make sure they are being understood.
- ▶ **Never assume** the other party understands you just because they do not ask questions.
- ▶ **“Think before you speak.”** They need to be quick thinking—sometimes to keep a caller’s attention. But this needs to be balanced against the possibility of saying something that you should not.
- ▶ **Vocabulary** is important. A successful Leasing Professional uses correct English and avoids slang.
- ▶ **Speaking** slowly and using less complex words are two ways to communicate more effectively with people who have limited English skills.
- ▶ **Voice inflection** is important. The tone used over the phone should be professional but upbeat. It should convey interest and enthusiasm.

Voice Inflection



Show Slide 14

During communication, only 7% of the meaning is derived from the actual spoken words. The rest is derived from non-verbal communication.

- I** *The following activity is designed to demonstrate to the class the importance of inflection in speech and how it can completely change the meaning of what we are intending to say.*



Show Slides 15-20

- I** *“I didn’t tell Tom you were stupid.”*

Explain to the class that you will read the sentence aloud to them six different times and that they are to tell you each time what you meant when you recited the sentence. (Ask them to simply call out their answers.)

As you read the sentence, place the emphasis on a different word for each reading. It is easiest if you change the inflection in the order that the words appear in the sentence. Listed below are the inflections and the meaning of each sentence as it sounds with the inflections listed.

1. Say: ***I** didn’t tell Tom you were stupid. Meaning: “Someone told Tom you were stupid, but it wasn’t me.”*
2. Say: *I didn’t **tell** Tom you were stupid. Meaning: “I may not have told him you were stupid, but I might have let him know in some other way.”*
3. Say: *I didn’t tell **Tom** you were stupid. Meaning: “I didn’t tell Tom—I told someone else.”*



4. *Say: I didn't tell Tom **you** were stupid. Meaning: "I told Tom that someone else was stupid."*
5. *Say: I didn't tell Tom you **were** stupid. Meaning: "I told him you **ARE** stupid."*
6. *Say: I didn't tell Tom you were **stupid**. Meaning: "I told him something else negative about you."*

Emphasize the importance of speaking with clarity and not rushing one's words. Let participants know that speaking skills can be learned if they are willing to take the time to improve them.



Show Slides 21

Empathic Listening

Perhaps as important as speaking is listening. Successful Leasing Professionals need to be good listeners if they are to do well with the wide variety of people who make telephone inquiries about apartment communities.

- I** *Play the Covey video "Empathic Listening" beginning with the Objectives introduction. After listening to the video, answer the three concept questions as a class – encourage the students to offer their personal "takes" on the lesson points.*

Break the room into partners and ask each set to complete the following:

Practice with a partner building an empathic conversation with one of the following:

1. An angry resident who received a late notice in error.
 2. A resident confused about having to ask a visitor to move out
 3. An employee who is trying to tell you about an uncomfortable resident encounter
 4. A coworker who has a new task and unsure how to proceed
- I** *Allow 10 minutes for couples to experiment with empathic listening and ask for two partners to share their impressions of both speaker and listener.*

Refer to the Resource Page to reinforce the critical concepts.

*Show Slide 22*

i Discuss the top 10 ways to improve listening listed below. Make sure that participants take notes and that the following information is contained in the presentation.

1. **Work** to understand the other person, not to impress him/her.
2. **Pay** attention to the substance of the speaker's requests. Do not allow grammar or speech patterns to interfere with your getting the correct message.
3. **Make** it a habit to listen first and respond second.
4. **Be attentive.** Let the speaker know you are listening and hearing the message.
5. **Listen** carefully for the main idea.

*Show Slide 23*

6. **Concentrate** on the facts and separate them from a speaker's opinion. Do remember the opinions, however, they may help you later in your presentation.
7. **Ask** good questions without overly interrupting the caller.
8. **Do not** allow positive or negative reactions to the speaker change your behavior and remain professional.
9. **Concentrate** all your energy on the speaker and summarize to keep your impressions correct.
10. **Jot down** more detailed notes after your conversation. These may provide you with additional questions when you meet the prospective resident.





Show Slide 24

Reasons Why People Use the Telephone to Shop for an Apartment

Research tells us that telephone prospects call an average of nine communities. Why do they invest so much time on the telephone? Nationally recognized industry speaker Bill Nye identifies these typical types of callers:



Show Slide 25

- ▶ **Time Saving Caller.** This caller uses the telephone to save himself the time of driving from community to community. This person wanting to save time might consider a bad phone call a bad use of their time. They want a quick response to their question, “how much are your apartments?” Yet as a Leasing Professional you are taught to try to engage the caller in conversation about the apartment, the property, his needs, etc. Consider the response, “I can tell that price is important to you, so do you mind if I discuss our features as well as our prices?” In this manner, you are answering the caller’s questions, but beginning to build a relationship and still control the call.
- ▶ **I Don’t Trust You Caller.** This caller is trying to avoid feeling the pressure to buy. Visiting the property and being shown throughout the community gives this prospect a sense of obligation, which they may want to avoid. At this point, start adding your qualifying questions slowly as he or she asks their questions. Gradually you will be able to complete your qualifying and ask the prospect to make an appointment to visit the community.
- ▶ **Geographical Caller.** This caller lives far away, making it impossible to come and visit the community. Your relationship is built on total trust as you become the caller’s eyes and ears about the apartment, the community, perhaps even the town. This caller needs the truth about location, commuting time and neighborhoods. The best way to earn that trust is to display knowledge about their current location. As a professional it is important to know where your traffic is coming from, where capitals, rivers, colleges, etc. are located for situations like this.

Note About Disabled Callers

Leasing Professionals may receive telephone calls from individuals using a TDD or TTY connection. These are services that allow a caller who is voice, sight or hearing impaired to keyboard their portion of the conversation. A “relay operator” converts the text message into conversational English and then communicates to the person who was called.

Here are a couple of tips from the voice relay operators for your professional handling of this type of call:

- ▶ The operator will convert the typed text into conversation, but will type verbatim your responses.
- ▶ There is more time involved in waiting for the typing to occur and the response to be registered—so BE PATIENT!
- ▶ If the caller is using American Sign Language (ASL) to key, the operator may need even more time to translate.
- ▶ The operator should be seen as an extension of the prospect. Relay operators tell us that it is important that the Leasing Professional speak to them as if speaking directly to the prospect—do not use phrases such as “Tell her...” In reality, you are speaking with the prospect. Remember the relay operator is typing your response verbatim.

The caller is as much a potential resident as anyone else with whom you speak—perhaps more so if you are patient and take the time to make a professional, caring presentation.



Show Slide 26

Objectives of Telephone Contact

There are seven basic objectives for the Leasing Professional to achieve from telephone contact with a prospective resident.

- I** *The seven objectives are noted and described below. Discuss each objective thoroughly to make certain the participants understand the need to obtain the information.*

*There is a more fully developed section in the Participant Guide that deals with this same information. **Please familiarize yourself thoroughly with the participant notes prior to teaching this program.***

Who? Leasing Professionals should identify themselves and obtain the caller's name. You want to establish rapport, but do not overuse the name. Determine who will be living in the apartment home, number of occupants and any pets. The objective is to qualify the prospective resident according to the community's standards. The more personal you make the call, the more likely you are to get the appointment.

What? Callers should be asked what they are looking for in their new home. Determine the size they desire, any amenities that are important, and the price range. The objective is to establish the prospective resident's needs. Once these needs are known, the Leasing Professional can begin to develop a leasing presentation and a mental image for the caller. It is also important to find out how the caller learned about your apartment community.

When? The Leasing Professional needs to know when the prospective resident wants to move. It may be an exact date or it may be a rough estimate. The greater the specificity, the more accurate the service that can be provided. The objective is to determine the sense of urgency and to match the prospective resident's needs to the apartments that will be available.

Where? Where the prospective resident is moving from as well as their job location will be helpful to the Leasing Professional. The objective is to collect information concerning future decisions and to learn how well the prospective residents know the area.

Why? Finding out why a prospective resident is considering moving to the apartment community is useful information but must be approached carefully. While the objective is to have helpful information for the Leasing Professional to use in satisfying the prospective resident's needs and wants, a request for this information may be interpreted as invasive and none of anyone's business. The successful Leasing Professional finds an appropriate place in the conversation to ask the question.

How much? The Leasing Professional tries to find out how much the prospective resident will consider spending. The shopper may bring this up early in the conversation. The objective is to establish the prospective resident's budget to see if they qualify.

An appointment? This is the first closing opportunity and the Leasing Professional should be ready with a calendar to schedule an appointment for the prospective resident to visit the apartment community. The objective is to turn a qualified prospective resident into a resident. Make sure you get the caller's telephone number for follow up.

Here is an example of how to obtain an appointment with a prospective resident:

- ▶ Leasing Professional: "When is a good time for you to come and take a look?"
- ▶ Prospective Resident: "This weekend."
- ▶ Leasing Professional: "Would Saturday or Sunday be more convenient for you?"
- ▶ Prospective Resident: "Saturday would be best."
- ▶ Leasing Professional: "Would you prefer morning or afternoon?"
- ▶ Prospective Resident: "Afternoon."
- ▶ Leasing Professional: "Is two o'clock or 3:30 more convenient for you?"
- ▶ Prospective Resident: "3:30 would be fine."
- ▶ Leasing Professional: "May I have your telephone number just in case we miss connections?"



Consider this telephone script and how it fulfills the objectives of the telephone contact:

- ▶ Leasing Professional: “Thank you for calling _____.”
- Prospective Resident: “Do you have any one bedroom apartments?”
- ▶ Leasing Professional: “Yes we do! My name is Mary and you are...? Do you mind if I ask you a few questions so I can better assist you in selecting a new apartment home?”
 - ▶ Are you looking for **yourself** or someone else?
 - ▶ **How soon** will you be needing your new apartment home?
 - ▶ **How many** will be occupying your apartment home?
 - ▶ **How did you hear** about us? (based on the source, build rapport.)
 - ▶ Do you have any **pets**? (explain your pet policy here if necessary)
 - ▶ What are the **three most important features** you're looking for in you new home?
 - ▶ **Why** are you moving?
 - ▶ (If the prospect asks for the price) What **price range** fits your budget? (In real life, this will probably be the first question. Respond by saying, “I'll be happy to give you that information, do you mind if I ask you a few questions so I can give you the price for the apartment home that best meets your needs?)
 - ▶ **We do have** a great _____ bedroom apartment home that will be available at that time. (Describe some of the **benefits** of the apartment home based on what this particular prospect may appreciate. Do not just offer a list of features.)
 - ▶ I'd love to show it to you, and give you a tour of our community. Would it be **convenient for you to come by** _____ or would _____ be better? (offer two options) (If neither is acceptable—“When would be convenient for you?”)
 - ▶ May I give you **directions** to our community?

- ▶ Do you have **Internet access**? (if yes) I'd like to **e-mail you a link** to our Web site, where we have more information about our community. (if no) Could I have an address where I could mail you our floor plans?
- ▶ Thank you so much for calling. I look forward to seeing you. May I have a **phone number** as a contact in case we miss connections?
- ▶ Thanks again and I look forward to seeing you (restate the appointment).



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There are also other things to keep in mind about the initial telephone conversation:

1. Make sure you guide the conversation.
2. As you respond to questions, make sure you ask some of your own so that you are learning information important to you.
3. Talk about a specific apartment rather than recite a range of floor plans or locations. It makes your conversation much more personal.
4. Elaborate on the benefits of this apartment before quoting rental rates. (People do not care about features. They are interested in how it will benefit them.)
5. Speak positively about the rates and the unique community features that are included in this price. Build the value of your apartment and your community.
6. Always remain pleasant even if you cannot schedule an appointment.
7. Leave prospective residents with a positive feeling. You never know when they may call again or refer a friend. Your kindness will go a long way!

Remember: Research shows that prospective residents who contact the apartment community in advance of their first visit are closed four times as often as those who do not!



Did You Know?

A 2004 Telephone Performance Analysis report by CallSource, an industry provider of distance learning, call measurement, tracking and monitoring technology and performance management solutions, reported disappointing results in how industry professionals are handling telephone traffic. Several problem areas include:

- ▶ **Name:** only 46% of Leasing Professionals asked callers for their names.
- ▶ **Price:** 67% of callers were simply told the price without any mention of apartment or community features.
- ▶ **Moving:** only 6% of callers were asked why they were moving.
- ▶ **Specific:** just 18% of Leasing Professionals asked the caller about their specific needs and preferences.
- ▶ **Benefits:** only 3% of professionals spoke about the benefits of the community amenities while 4% spoke about benefits of the apartment homes.
- ▶ Only 45% qualified the advertising source.
- ▶ Only 17% directed the prospect to visit the community's Web site.

Do not let this happen to you! You can see that your attention to a professional and sincere telephone leasing presentation will beat the odds and make you stand out in the crowd!

Do not become a statistic of poor telephone performance!



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Initial Leasing Questions

Of all the questions that are asked of Leasing Professionals on the telephone, the initial question is probably the most important, as it sets the tone for the remainder of the conversation. Successful Leasing Professionals know that you should not give pricing information the first time you are asked, but should instead, begin a dialogue with the prospective resident that begins the relationship leasing process. This exercise teaches the participants the importance of that response to the initial question.

1 *Directions: Ask the class to list the most frequently asked questions they get from first time telephone callers. Have them call out their responses and write them on a flipchart for the entire class to see. The responses will generally include the following:*

- ▶ “Do you have any...” (one bedroom apartments? ...first floor apartments?)
- ▶ “How much are...” (your two bedroom apartments? ...utilities on the average? ... security deposits?)
- ▶ “Can you tell me about...” (the location..the apartments...)

Ask the participants what they have been saying in response to the initial question. List their answers on the flipchart. Discuss, as a class, which of the answers is appropriate and why.





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What is the Appropriate Response to the Initial Question?

- i** *If the discussion does not lead itself to the following, be certain to present this material to the participants.*

All of these questions should be answered in the same way: with a positive, upbeat response that assures the caller his/her question will be answered, followed by a question.

Example:

Caller: How much are your two bedrooms?

Leasing Professional: I can help you with that. When do you need to move into our community?

Notice how the Leasing Professional answered the prospective resident's question, but followed up with a question of his or her own. This technique, referred to as Q/A/Q for Question/Answer/Question, is highly effective as it helps to gain additional information from the prospective resident, thereby helping to build the relationship.

This method accomplishes several things at once:

1. It deflects the price issue momentarily. Try to gather more information for your "value building" presentation.
2. It places the Leasing Professional in control of the call (by offering to help and by asking a question).
3. It helps qualify the caller by asking when they need their apartment home.
4. It begins the closing process with use of the "Assumptive Close". This closing technique assumes that the caller will be moving into the community, thus the question is worded, "When do you need to move into our community?"



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What's Wrong with this Telephone Call?

Providing the price when asked initially by the caller does nothing to build the relationship. Take a look at the following call scenario:

I *Ask a member of the class to “role play” this with you. Let them read either part.*

Leasing Professional: “Good morning. Macie Manor Apartments. Thank you for calling. This is Jenna.”

Prospective Resident: “Do you have any one bedroom apartments available?”

Leasing Professional: “Yes we do.”

Prospective Resident: “How much are they?”

Leasing Professional: “They start at \$425.”

Prospective Resident: “Okay. What are your office hours?”

Leasing Professional: “Nine to five, Monday through Saturday.”

Prospective Resident: “Okay. Thank you.”

CLICK (The Leasing Professional hangs up the telephone.)

Prospective Resident: “Wait a second..I’ve got one more question!...Hello?”

CLICK (The prospective resident hangs up the telephone.)



- ① *Ask participants:*
 - *How many objectives were satisfied?*
 - *What did the Leasing Professional learn about the caller's needs in the conversation?*
 - *How could the Leasing Professional have made this call more successful?*
 - *How often have they (participants) acted in the same fashion as the Leasing Professional in the example?*

Remember, the key is to begin to build a relationship with the prospect!

- ① *Ask the participants to read the following two scenarios and then conduct a discussion on how they would respond to the questions asked by the prospective residents.*

Scenario #1

Prospect: "I was just over at Happy Hills Apartments across the street and they have a great lap pool, tennis courts, a huge fitness center and a business center. The apartment I saw had built-in bookshelves, three ceiling fans and new appliances. Can you beat that?" (In this situation consider that you have less of an amenity package)

- ① *The participants should focus on what the prospect values*
 - ▶ How often will you actually use the pool, tennis courts, etc?
 - ▶ Did I mention there's a Community Center just one block from here that you are welcome to use?
 - ▶ We are really committed to serving our residents. Did you ask about their service?

Scenario #2

Prospect: “You just quoted me a price that seems sort of high. You’re the third place I’ve called today and there are some pretty good deals out there. Don’t you have some kind of a special?” (In this situation consider that you have a competitive program but not the biggest special.)

- i** *Participants might suggest that they would tell the prospective resident that a deal is a short term plan for a short term relationship—we want you to stay. Another response might be, we believe that we offer a good value in apartment living. The goal is to emphasize value and quality of lifestyle. Invite the caller to visit so they can see for themselves.*



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Key Elements of a Successful Leasing Presentation

The successful Leasing Professional realizes that **the leasing presentation begins the moment the telephone is answered**. The prospective resident begins to develop feelings about the Leasing Professional and the apartment community and begins to measure these feelings against emotional needs and wants. Remember, “People buy from people they like.”



There are three elements of an effective leasing presentation. They are highly useful in helping Leasing Professionals organize their telephone presentations. The three categories are:



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1. **Persuade:** Make the caller feel important, that they are genuinely liked.
 2. **Inform:** Know your product and provide strong reasons for living at your community.
 3. **Enthuse:** Convey enthusiasm and belief in your community. Remain prospect oriented at all times.
- I Take time to elaborate on these elements and how they relate to telephone presentations. Remind them of the acronym PIE, which stands for **Persuade, Inform, Enthuse.***

Closing Begins with the Telephone

Of all of the sources of traffic into the apartment community, the telephone contact is considered the hardest to close. The prospective resident saw or heard advertisements and is now phoning for additional information.

While it is still somewhat unusual for a Leasing Professional to lease an apartment over the phone, in some high demand markets this is becoming far more commonplace. Additionally, the explosive use of the Internet allows prospective residents to be much better informed before they ever pick up the telephone. However, some participants may not understand why they are working on “closing” before the prospective resident comes for a visit.



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i Tell participants that the successful Leasing Professional:

1. Establishes a relationship over the telephone with a prospective resident.
2. Gathers information that can be used to satisfy the needs and wants of the prospective resident.
3. Describes the community in words or phrases that help the prospective resident envision the community as well as their future apartment home.
- !** 4. Looks for opportunities to “close” the telephone conversation with an appointment.

The face to face activities (described in later programs) provide additional closing opportunities. But the Leasing Professional who leaves a caller with a poor impression may not be able to create the trusting relationship so important to adding new residents to their community.





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Tracking Weekly Traffic

A successful Leasing Professional keeps careful records of all traffic, studying these records from time to time to see what can be learned from them. Remind participants that prospects may need guidance through this process. The easiest response from a prospect when asked how he found they you, is to say “driving by”. The Leasing Professional may have to question further to gain the true source. Encourage participants to keep weekly traffic logs. This may help them identify the most productive sources of traffic and suggest possible follow up activities.

Most apartment community management companies and/or owners have their own format that they will require the Leasing Professional to complete on a daily basis. Remind the participants that this is an essential tool, not only for their own professional success but for the success of their community as well.

- ⓘ Remind participants of the importance of knowing where their apartment community is advertising. They will be better equipped to properly track the leasing traffic that calls, e-mails, faxes or visits their apartment community.*



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Taking Requests for Service

While Leasing Professionals provide services to prospective residents, they also provide services to existing residents. The Leasing Professional may hang up on someone who has just spent 30 minutes on the telephone before deciding to make an appointment and then pick up a call from a resident with a problem.

This same spirit of service must carry over from one situation to another.

1 *You may want to start this section with a series of questions designed to see how much participants already know. The questions provide a framework for the rest of this section:*

- 1. What are the three most frequent requests for services from existing residents at your community?*
- 2. Which requests are easiest to address? Which are hardest? Why?*
- 3. Do you notice any difference in your manner when talking with prospective residents than with existing residents? If so, how do you account for it?*

One of the most important functions of a Leasing Professional is to provide service to residents. Requests for service should not be viewed as complaints and should be welcomed for the opportunities they provide.

A request for service provides the Leasing Professional with the opportunity to remind the resident that services are provided as long as they live in the apartment community. This helps improve resident satisfaction and therefore, resident retention.

Providing service demonstrates a caring attitude on the part of management.

! Providing good service corrects a defect before it does further damage or wastes time and money. It is especially important that calls about water intrusion and leaking are handled quickly since mold can occur within 24-48 hours.



There are three steps to successfully responding to requests for service from residents. They are:

- ▶ Identifying caller needs
- ▶ Resolving Problems
- ▶ Conducting Follow-up



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Identifying Caller Needs

When a resident calls with a problem in an apartment, it is necessary for the Leasing Professional to learn the exact nature of the problem. This may be difficult to do because the resident may know only that something is not working or that something smells unusual.

The better the Leasing Professional knows their community and its components, the easier it will be to understand potential problems. Be sure to get complete details from the resident reporting the problem or requesting service. This will help your maintenance staff determine the tools to bring and will assist in scheduling. Know what issues are given emergency status.

Information that should be obtained from the resident generally includes the following:



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- ▶ Resident's name
- ▶ Apartment number
- ▶ Telephone number at work, at home and their cell phone
- ▶ The day's date and the time of the call
- ▶ Permission to enter the apartment
- ▶ Whether or not the resident has a pet
- ▶ Code to the intrusion alarm if the resident has an alarm system
- ▶ Specific nature of the problem
- ▶ Specific location of the problem

It will help to have a “Service Request” form handy so all necessary details are noted. This also allows the Leasing Professional to review all the information with the caller before deciding what steps to take to solve the problem. Make sure you thank the resident for calling this to your attention. Let them know that they have done you a favor.

Caution: While security deposits often cause friction between residents and management, false promises run a close second. Make sure participants understand the importance of not promising something unreasonable just to conclude the call.





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Resolving Problems

Gathering all of the relevant information about the problem will help make solving it much easier.

Sometimes you can help residents solve their own problems.

- i** *Have participants consider the two examples in their Participant Guide and help them learn how to solve problems without having to turn to maintenance. Also discuss other solutions to minor problems that the Leasing Professional and the resident may be able to work out before calling maintenance. If the situation involves flooding or immediate damage to buildings or risk to lives, the service department should be called immediately. Always know what constitutes an emergency.*

Conducting Follow-Up

The effective Leasing Professional always follows up a request for service with a telephone call to the resident to make sure the resident is satisfied.

It is an equally sound idea to follow up another time if the Leasing Professional sees the resident on the grounds. Such attention reminds the resident that their problems are important and the apartment staff is there for service requests.



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Handling Irate Callers

- I** *Ask participants to list the most frequent causes of telephone calls from irate residents at their communities. Use the first set of numbers and blanks. After three or four minutes, categorize the calls into such categories as old problem/new problem, facility problem/other resident problem, perceived problem/real problem. Lead a class discussion on reasons for irate calls and the five main reasons they are generated. Avoid discussing how Leasing Professionals should handle the problems at this time but teach participants how to look beyond the obvious and listen carefully to what the resident is saying. In the second set of blanks, tell participants that the most frequent causes of irate calls are:*



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- ▶ Previous service request was ignored.
 - ▶ Previous service request is still not completed.
 - ▶ Increase in rent or decrease in amenities/ resource facilities.
 - ▶ Personal problems of the caller unrelated to the service request.
 - ▶ Problems with neighbors.
- I** *Discuss why personal problems sometimes result in irate calls and how the Leasing Professional should handle them. While there is no good reason for tolerating an abusive caller, there are many good reasons to empathize with a resident's situation.*

Treat the irate caller with dignity and the Leasing Professional will be rewarded at some later date with a “Thanks!” or “I’m sorry” or some similar acknowledgment that the caller was indeed having a bad day.



There is a set of recommended procedures for dealing with irate phone calls from residents. They are as follows:



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- ▶ Remain calm; do not let the caller's emotional state change your professionalism.
- ▶ Use the caller's name once or twice during the conversation.
- ▶ Listen to everything the caller says without interruption.
- ▶ Identify the problems; make sure you understand the specific concern.
- ▶ Probe for additional information; you need as much information as you can obtain to affect a solution.



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- ▶ Apologize for any inconvenience, real or imagined; it doesn't hurt to let the resident know that the Leasing Professional truly regrets the situation.
- ▶ Keep the voice low; do not let it escalate if the conversation gets more heated.
- ▶ Reassure the caller that everything possible will be done to solve the problem.
- ▶ Follow up to make sure the resident is satisfied with the results.
- ▶ Take thorough notes throughout the conversation.

Then the Leasing Professional solves the problem or finds someone who can. In the situations where the Leasing Professional cannot effect a solution, the supervisor should be informed and asked to contact the resident.

Irate Resident Phone Call Activity

- 1 *An interesting activity to conduct in front of the class is for the instructor to assume the role of an irate resident. The instructor will generally be able to play the role well due to much experience in this area.*

The instructor should ask for volunteers or select a participant to play the Leasing Professional.

Allow the “Leasing Professional” to be seated at a desk with paper and pencil available. The “Leasing Professional” and the instructor should sit back to back in front of the class. This way everyone in the class can see and hear the exchange but the “Leasing Professional” and “irate caller” will not be face to face, just like in a normal telephone conversation. The instructor may want to repeat the role play with another participant.

Note: The environments of most training facilities do not lend themselves to having participants pair off to do the role play. If your class size is very small or the facility large, consider having all participants participate in this training activity.

After the role play, debrief participants by having them analyze what they have just seen and heard.

Discuss how the key actions assist in handling irate callers.



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Fair Housing Implications

All Leasing Professionals are required by law to provide equal professional services without regard to a resident/ prospective resident's race, color, religion, sex, disability, familial status, or national origin.



The Fair Housing statutes affect such telephone presentation behaviors as:

- ▶ Arranging appointments;
- ▶ Making callbacks;
- ▶ Acts of courtesy;
- ▶ Personal information required;
- ▶ Availability of properties presented;
- ▶ Location of properties presented; and
- ▶ Follow-up procedures.

It is important that accurate records be kept for all properties and all prospective residents. All records should be kept for at least five years.

Leasing Professionals must know how to restrict their questions to matters relevant to processing each applicant, being sure to uniformly ask the same questions to all applicants.

Summary



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At this point, you should summarize this course.

While apartment communities may spend thousands of dollars per year in advertising costs, the most important marketing tool any apartment community has is their telephone and you, the Leasing Professional who takes the call. Your voice inflection, your product knowledge, your skill in setting appointments and selling the community are all critical elements in bringing qualified prospective residents to your apartment community.

Equally important are your skills in providing residents with top-notch customer service when taking a request for service or answering a simple question. Compliance with the Federal Fair Housing Act is also crucial to not only your community's individual success, but to the success of the apartment industry.

Remember that the telephone is not an interruption of your work – it is your work!

- I** *Ask participants to close their Participant Guides and give one example of something they remembered or learned from each of the main headings of the course.*



Exam

The NALP exam is comprehensive and delivered online. The NALP Exam is 100 questions and timed for 1 hour and 30 minutes. All participants must enroll in the designation program to be eligible to sit for the exam. To enroll in the NALP course, direct participants to the NAA Web site at:

www.naahq.org/education

Participants will need an eligibility code to sit for the exam. The Eligibility Code will be e-mailed to each Affiliate after a participant enrolls in the course. Eligibility Codes are unique to each participant and are the key to unlocking the exam.

The passing point for the comprehensive exam is 70 or above.

Each participant will work individually on the exam. There should be no discussion among participants and no books are allowed to be used as reference.

For more detailed information on the exam and to download the Participant and Instructor Guides, please visit the NAA Web site:

www.naahq.org/education/designationprograms/Pages/OnlineExams