



4324 N. Beltline Road, Suite C105, Irving, TX 75038
 (972) 256-3767
 www.epmsonline.com

Authorized By:
 Company Name:

Special Instructions:

Summary	Shopping Report Score			
		Possible Points	Earned Points	Percentage
Telephone Professional:				
Date Called:	Telephone	100	0	0.0%
Time Called:	Greeting	20	0	0.0%
Length of Call:	Identifying Needs	20	0	0.0%
On-Site Professional:	Demonstrating	25	0	0.0%
Date Visited:	Closing	30	0	0.0%
Time Visited:	Follow-Up	5	0	0.0%
Length of Visit:	On-Site Total	100	0	0.0%
Weather Conditions:	Total Score	200	0	0.0%
	Multifamily Industry Benchmark	100	0	0%

Shopper Information

Shopper Name:

Name Given (Telephone):

Name Given (On-Site):

Guest Accompanying Shopper:

Relationship to Shopper:

Address:

City:

State:

Zip:

Home Phone:

How shopper learned of the community:

Apartment size:

Date needed:

Pets:

Number of occupants:

Reason for moving:

Special needs or preferences:



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Community:

Date:

Telephone Professional:

On-site Professional:

Executive Summary

- 1 Leasing Professional's overall attitude and impression.
- 2 Leasing Professional's primary closing technique.
- 3 Based on the Leasing Professional's presentation, would you have leased this apartment? Why or Why Not?
- 4 Leasing Professional's strongest points.
- 5 Leasing Professional's weakest points.

Overall Comments:

Leasing Professional's Shopping Report Score

	Possible Points	Earned Points	Percentage
Telephone	100	0	0.0%
Greeting	20	0	0.0%
Identifying Needs	20	0	0.0%
Demonstrating	25	0	0.0%
Closing	30	0	0.0%
Follow-Up	5	0	0.0%
On-Site Total	100	0	0.0%
Total Score	200	0	0.0%
Multifamily Industry Benchmark	100	0	0%

A Note About Our Scoring System:

EPMS strives to provide a fair and unbiased report every time. We also work hard to maintain a scoring system whose standards are equal from report to report. The individual report categories are given point values. As a general guideline, each percentage can be rated as follows:

Excellent 100-95 Very Good 94-85 Good 84-75 Fair 74-65 Poor 64 and below

Please note that these scores should be used only as guidelines or indicators and cannot fairly tell the whole story. Thus, the EPMS report gives you additional narrative for a better understanding of what actually happened. Some of the best sales people break all the rules and still achieve the goal...a good, qualified lease. Perhaps the most important question our shopper answers is, "Based on this Leasing Professional's presentation, would you have leased this apartment?"

A Note About Our Multifamily Industry Benchmark Scoring System:

The Benchmark score measures the affirmative response to ten key and universal shopping report questions. Each benchmark question is given a 10 point value. The ten industry standard questions in this report are bolded.

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Telephone - 100 points possible**Score:** 0 | 0.0%

Other Calls:

01 Did the Leasing Professional answer with the name of the community? Yes | No | N/A 0/3

Exact Greeting:

02 Did the Leasing Professional identify him/herself? Yes | No | N/A 0/3

03 Did the Leasing Professional obtain your name during the telephone presentation? Yes | No | N/A 0/3

04 Did the Leasing Professional effectively use your name in conversation? Yes | No | N/A 0/3

05 Did the Leasing Professional convey a warm and inviting attitude? Yes | No | N/A 0/3

Please explain.

06 Did the Leasing Professional ask for your telephone number? Yes | No | N/A 0/15

06a Did the Leasing Professional ask for additional contact information?

* Mailing address Yes | No | N/A

* Email address Yes | No | N/A

07 Did the Leasing Professional ask how you knew the community? Yes | No | N/A 0/3

08 Did the Leasing Professional determine any of the following? 0/30

a Size apartment Yes | No | N/A 0/5

b Move-in date Yes | No | N/A 0/5

c Number of occupants Yes | No | N/A 0/5

d Pets Yes | No | N/A 0/5

e Price range Yes | No | N/A 0/5

f Specific needs (i.e. w/d connections, up/downstairs, fireplace) Yes | No | N/A 0/5

09 Did the Leasing Professional suggest you visit the community website or company website? Yes | No | N/A

10 Did the Leasing Professional describe apartment features and/or community amenities? Yes | No | N/A 0/3

Please explain.

11 Did the Leasing Professional create a sense of urgency? Yes | No | N/A 0/3

12 Did the Leasing Professional extend an invitation for you to visit the community? Yes | No | N/A 0/3

13 Did the Leasing Professional try to set a specific Yes | No | N/A 0/15

appointment?

Please explain.

- | | | |
|---|---|------|
| 14 Did the Leasing Professional offer directions to the community? | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | 0/3 |
| 15 Based on the Leasing Professional's presentation, were you motivated to visit the community? | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | 0/10 |
-

Telephone Comments:

Community Information

- | | | |
|----|--|---|
| 01 | Did you easily locate the community? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 02 | Were the main community signs clear, visible and in good condition? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 03 | Were there adequate signs directing you to the leasing office/information center? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 04 | Were the lawns and landscaping neat and trim, and free of all trash? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 05 | Was the general appearance of the parking area in good condition and free of trash? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 06 | Were the community amenities you saw (i.e. pool, tennis courts, etc.) clean, attractive and well maintained? | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A |
| 07 | Was the leasing office clean, neat, and orderly? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 08 | Did the leasing office communicate warmth and welcome? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 09 | Was your first impression of the community and curb appeal a positive one? | <input type="checkbox"/> Yes <input type="checkbox"/> No |

Community Comments:

Greeting - 20 points possible

Score: 0 | 0.0%

- | | | | |
|-----------|--|---|-----|
| 01 | Did the Leasing Professional greet you with a smile, or if busy, acknowledge you immediately? | <input type="checkbox"/> Yes <input type="checkbox"/> No | 0/2 |
| 02 | Did the Leasing Professional stand to greet you? | <input type="checkbox"/> Yes <input type="checkbox"/> No | 0/2 |
| 03 | Did the Leasing Professional shake your hand? | <input type="checkbox"/> Yes <input type="checkbox"/> No | 0/2 |
| 04 | Exact greeting: | | |
| 05 | Did the Leasing Professional introduce him/herself? | <input type="checkbox"/> Yes <input type="checkbox"/> No | 0/2 |
| 06 | Did the Leasing Professional obtain your name during the visit? | <input type="checkbox"/> Yes <input type="checkbox"/> No | 0/2 |
| 07 | Did the Leasing Professional continue to use your name in the conversation? | <input type="checkbox"/> Yes <input type="checkbox"/> No | 0/1 |
| 08 | Did the Leasing Professional ask you to sit down? | <input type="checkbox"/> Yes <input type="checkbox"/> No | 0/2 |
| 09 | Did the Leasing Professional make a positive first impression and appear genuinely interested in helping you? | <input type="checkbox"/> Yes <input type="checkbox"/> No | 0/5 |
| 10 | Did the Leasing Professional offer you refreshments? | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | |
| 11 | Was the Leasing Professional professionally dressed (i.e. business casual or uniform)? | <input type="checkbox"/> Yes <input type="checkbox"/> No | 0/2 |

What was the Leasing Professional wearing?

12 Did the Leasing Professional wear a nametag? Yes | No

13 Did the Leasing Professional remember your telephone call? Yes | No | N/A

14 Did the Leasing Professional have previous information on you readily available? Yes | No | N/A

15 If the phone agent was out, was someone else able to help you from the information previously taken over the phone? Yes | No | N/A

Please explain.

Greeting Comments:

Identifying Needs - 20 points possible**Score:** 0 | 0.0%

01	Was a guest card completed on paper or electronically (i.e. information entered into a computer)?	<input type="checkbox"/> Yes <input type="checkbox"/> No	0/2
	By whom?		
02	Did the Leasing Professional determine how you knew the community?	<input type="checkbox"/> Yes <input type="checkbox"/> No	0/2
03	Did the Leasing Professional identify any of the following?		0/8
a	Size apartment	<input type="checkbox"/> Yes <input type="checkbox"/> No	0/1
b	Move-in date	<input type="checkbox"/> Yes <input type="checkbox"/> No	0/1
c	Number of occupants	<input type="checkbox"/> Yes <input type="checkbox"/> No	0/1
d	Telephone number (Home, work, pager and/or cell.)	<input type="checkbox"/> Yes <input type="checkbox"/> No	0/1
e	Price range or budget	<input type="checkbox"/> Yes <input type="checkbox"/> No	0/1
f	Pets	<input type="checkbox"/> Yes <input type="checkbox"/> No	0/1
g	Where you live now or a mailing address	<input type="checkbox"/> Yes <input type="checkbox"/> No	0/1
h	Email address	<input type="checkbox"/> Yes <input type="checkbox"/> No	0/1
04	Did the Leasing Professional ask why you were moving?	<input type="checkbox"/> Yes <input type="checkbox"/> No	0/2
05	Did the Leasing Professional determine if you had any specific needs or preferences (i.e. location, color, etc.)?	<input type="checkbox"/> Yes <input type="checkbox"/> No	0/2
06	Did the Leasing Professional create rapport while attempting to determine your needs?	<input type="checkbox"/> Yes <input type="checkbox"/> No	0/2
	Please explain.		
07	Did the Leasing Professional request proper identification before taking you to the apartment and/or community?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	0/2

Identifying Needs Comments:

Demonstrating - 25 points possible**Score:** 0 | 0.0%

Did you view an apartment (i.e. model, vacant, occupied, or office apartment, etc.)? Yes | No

Please explain.

(Note: If an apartment was not shown, questions 1-14 in Section One are marked "NA" and replaced by question 15 in Section Two.)

Section One

01 Did the Leasing Professional take control and lead with enthusiasm? Yes | No | N/A 0/2

02 Did the Leasing Professional take a scenic, yet convenient route to the apartment? Yes | No | N/A 0/1

03 Did the Leasing Professional initiate and carry on a friendly conversation as you walked to and from the apartment? Yes | No | N/A 0/2

Please explain.

04 Did the Leasing Professional mention the professional management? Yes | No | N/A 0/2

05 Did the Leasing Professional mention the on-site personnel? Yes | No | N/A 0/1

06 Did the Leasing Professional discuss and/or point out amenities and facilities of the community? Yes | No | N/A 0/3

Please explain.

07 Did the Leasing Professional discuss neighborhood facilities (i.e. shopping, restaurants, entertainment) or neighborhood conveniences? Yes | No | N/A 0/1

08 Were you shown:

Model

Occupied

Vacant

Office/Apt

What apartment number(s) were shown to you?

09 Did the Leasing Professional show an apartment that was clean, made ready, and comfortable in temperature? Yes | No | N/A 0/3

If not, please explain.

10 Did the Leasing Professional mention benefits for the apartment features s/he demonstrated? Yes | No | N/A 0/3

Please explain.

11 Did the Leasing Professional get you actively involved in the Yes | No | N/A 0/1

tour?

12 Did the Leasing Professional point out advantages you said were important? Yes | No | N/A 0/2

13 Did the Leasing Professional effectively overcome your objection(s)? Yes | No | N/A 0/3

Please explain.

14 Did the Leasing Professional begin asking closing questions early in the presentation? Yes | No | N/A 0/1

Please explain.

Section Two

15 If an apartment was not shown, did the Leasing Professional attempt any of the following? Yes | No | N/A 0/25

a Offer an alternate floor plan or ask if your move-in date was flexible? Yes | No | N/A 0/4

b Mention professional management? Yes | No | N/A 0/2

c Mention on-site personnel? Yes | No | N/A 0/2

d Discuss and/or offer a tour of the community amenities? Yes | No | N/A 0/5

e Discuss the neighborhood facilities? Yes | No | N/A 0/2

f Review floor plans by discussing the layout and/or apartment features and benefits? Yes | No | N/A 0/5

g Overcome objections? Yes | No | N/A 0/5

Comment on your objection and his/her response:

Demonstrating Comments:

Closing - 30 points possible**Score:** 0 | 0.0%

01	Did the Leasing Professional invite you back to the office following the tour of the apartment and/or community?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	0/1
02	Did the Leasing Professional discuss rental rates positively and confidently?	<input type="checkbox"/> Yes <input type="checkbox"/> No	0/1
03	Did the Leasing Professional ask you to leave a deposit or other monetary commitment (i.e. security deposit, application fee, etc.)?	<input type="checkbox"/> Yes <input type="checkbox"/> No	0/5
04	Did the Leasing Professional create a sense of urgency?	<input type="checkbox"/> Yes <input type="checkbox"/> No	0/2
05	Did the Leasing Professional attempt any of the following closes?		0/8
a	Ask you to fill out the application?	<input type="checkbox"/> Yes <input type="checkbox"/> No	0/4
b	Ask to hold an apartment for you?	<input type="checkbox"/> Yes <input type="checkbox"/> No	0/4
c	Ask questions that generated a yes/no answer (i.e. "do you like the apartment?", "will your furniture fit?", etc.)?	<input type="checkbox"/> Yes <input type="checkbox"/> No	0/4
d	Use assumptive phrases (i.e. "your apartment", "you'll love living here", etc.)?	<input type="checkbox"/> Yes <input type="checkbox"/> No	0/4
e	Ask you to sign a waiting list and/or leave a floating deposit (if nothing was available)?	<input type="checkbox"/> Yes <input type="checkbox"/> No	0/4
f	Use a closing technique not listed above?	<input type="checkbox"/> Yes <input type="checkbox"/> No	0/4
Please specify:			
<i>*The closes listed above are worth 4 points each; however, a maximum of 8 points is allowed for this question. The leasing consultant must ask 2 of the closes to receive full credit for this question.</i>			
06	What was your reason for not leasing at this time?		
What was the Leasing Professional's response?			
07	Did the Leasing Professional attempt to schedule another visit to the community?	<input type="checkbox"/> Yes <input type="checkbox"/> No	0/2
Please explain.			
08	Did the Leasing Professional provide you with any promotional materials (i.e. business card, brochure, floor plan, application, and/or qualifying criteria, etc.)?	<input type="checkbox"/> Yes <input type="checkbox"/> No	0/1
09	Did the Leasing Professional suggest you visit the community website or company website?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
10	Based on the Leasing Professional's presentation, would you have leased an apartment?	<input type="checkbox"/> Yes <input type="checkbox"/> No	0/10
11	If unable to meet your needs, did the Leasing Professional refer you to another community?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
12	Did the Leasing Professional do or say anything to make your	<input type="checkbox"/> Yes <input type="checkbox"/> No	

visit "extraordinarily" memorable?

Please explain.

Closing Comments:

Fair Housing/Crime Supplement

01 Did the Leasing Professional say or do anything to discourage you from leasing due to any issues that could have been perceived as discriminatory?

02 When you asked, "What type of people live here?", how did the Leasing Professional respond?

03 When you asked, "What kind of security do you have?" or "Is this a safe area?", how did the Leasing Professional respond?

Follow-Up - 5 points possible**Score: 0 | 0.0%**

01 Did the Leasing Professional follow-up by telephone within 72 hours? Yes | No | N/A 0/3

Date of follow-up:

02 Did the Leasing Professional follow-up in writing within 5 days? 0/2

a Thank you note. Yes | No | N/A

Date Received

b Email. Yes | No | N/A

Date Received.

SHOPPING REPORT FOLLOW-UP FORM

Community:

Date of Evaluation:

Telephone Professional:

Telephone Score:

0

On-Site Professional:

On-Site Score:

0

Total Score:

0

1. What strengths are exhibited in this evaluation?

2. Which areas are in need of improvement?

3. What goals have been set to improve these areas?

4. Within what time frame are these goals to be achieved?

5. Leasing Professional's comments:

6. Did the Leasing Professional conduct appropriate follow-up with the prospect?

Is a follow-up report needed? Yes No

If yes, when?

Review completed by: _____

Date: _____

R. M. signature: _____

Date: _____

Leasing Professional's signature: _____

Date: _____

PLEASE RETURN THIS FORM TO YOUR REGIONAL MANAGER.