



A NABO DESIGNATION

Certified Leasing Professional Program

Basic CLP
Shopper's Report

The National Associated Builders and Owners
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NAME: _____

COMPANY: _____

LOCAL ASSOCIATION/COURSE SPONSOR: _____

DATE: _____

Shopper's Report

The Shopper's Report assignment is a requirement for designation as a Registered Apartment Manager. This assignment must be completed to obtain CLP certification.

The Shopper's Report is done in three parts:

- Telephone survey
- Personal visits
- Summary of rental techniques observed

Instructions

1. Read the assignment completely and thoroughly before beginning.
2. Select a property that is not managed by a friend or acquaintance. Shop your competition!
3. Call the selected property to:
 - (a) Do a telephone survey, and
 - (b) Make an appointment to visit.
4. Do not take the Shopper's Report with you to the appointment. The idea is to appear as a potential renter.
5. Complete the Shopper's Report and return it to your instructor, local CLP Administrator, or RAM Dean.
6. All information collected for the Report will remain confidential.

SHOPPER: _____

PROPERTY: _____

DATE: _____ TIME: _____

TELEPHONE CONTACT

1. Was telephone contact made before visiting the property?

2. If so, how did the representative answer the telephone?

3. Did the representative ask for your name?

4. Did the representative ask about specific needs, such as:
 - a. The number of people to live in the apartment?
 - b. Whether you have pet(s)?
 - c. When you need to move in?

5. Were directions given on how to reach the property?
 - a. Were they clear and accurate?

6. Were you encouraged to visit the property?

7. Did the representative make any unusually positive or negative statements during your telephone conversation?
Explain:

8. Did the representative have a professional, friendly telephone manner?
Other comments:

AT THE APARTMENT COMMUNITY

1. Did you have difficulty locating the apartment community?
2. Were all signs clear, visible, and upright?
3. Was the apartment office easy to locate?
4. What were your initial observations or impressions?
5. Upon your arrival, did the representative greet you immediately, or acknowledge your presence?
6. Did the representative stand up when you entered the office?
7. What was the representative doing when you entered the office?
8. What introduction was made by the representative?
9. Did the representative use your name more than once during the presentation?
10. Was the representative dressed appropriately?
11. Was the apartment office clean, neat, and inviting?
12. Was the office in an apartment?
13. Was there a business-like atmosphere in the office, or was it more casual?
14. Was a "HUD Equal Opportunity" poster or plaque displayed in the office?
15. Was the "HUD Equal Opportunity" poster neatly displayed in an easily visible location?
16. Did the representative ask you to fill out a guest/information form?

Other comments:

PROSPECTIVE RESIDENT INTERVIEW

1. Did the representative ask you how you learned of the apartment community?
2. Did the apartment community's advertising contain the equal housing logo, and an equal housing opportunity statement?
3. Did the representative ask why you are moving?
4. Did the representative give you the opportunity to express your specific needs?
5. Was the representative able to answer all your questions regarding schools, churches, parks, and recreational facilities on the premises or nearby?
6. Did the representative ask where you work, and point out the conveniences of this apartment in terms of location?
7. Were utility questions answered clearly and completely?
8. What amenities or facilities were described?
9. When you asked what the apartment rented for, did the representative answer confidently, or did he seem uncomfortable or apologetic for the cost?
10. Did the representative make a positive impression?
11. Would you like to have this person as the representative of the apartment you choose to live in?
12. Did the representative explain any restrictions regarding:
 - a. Pets?
 - b. Number of children?
 - c. Number of persons allowed to occupy the apartment?
13. During the visit, did the representative explain the policies regarding trailers, trucks, vans, and motorcycles?
14. Were security deposit procedures explained clearly and completely?
15. Did you have any questions the representative could not, or did not, answer?

AT THE APARTMENT SHOWN

1. Were you shown a model, or a vacant apartment?

Please describe its condition:

2. Were you shown recreational facilities, laundry areas, etc.?

3. What benefits did the representative point out in the apartment?

4. Did the representative mention other residents on the property with similar interests to yours?

5. Was the representative enthusiastic about showing the apartment?

6. Was the representative confident, knowledgeable, and comfortable with pointing out the interesting characteristics of the property and the apartment unit?

7. What specific advantages did the representative mention about the apartment that made a positive impression?

8. Was the temperature comfortable in the apartment?

9. Did the representative ask you to actively examine the apartment (opening doors, inspecting cabinets, raising blinds, etc.)?

10. Was the apartment spotlessly clean (kitchen appliances, bathroom fixtures, shelves, carpet, counter tops, closets, etc.)?

Other comments:

CLOSING TECHNIQUES

1. Did the representative urge you to return to the apartment office upon leaving the apartment?
2. Did the representative ask closing questions early in the presentation?
3. Did the representative try to close more than once?
4. What was the representative's best closing technique?
5. Did the representative urge you to rent the apartment and/or leave a deposit (or cleaning fee) at the time of the visit?
6. Did the representative provide brochures, floor plans, or other materials about the property?

If so, at what point during the visit were these materials provided?

7. If you received a brochure at the site, did it contain an equal housing opportunity logo and statement?
8. What did the representative say when you said that you were just looking, or had other appointments you wished to see before making a decision?
9. Did the representative mention other apartment communities in the area?
 - a. How were they mentioned?
 - b. Were they recommended or not? (If not, ask for recommendations of other apartments in the area.)
 - c. Name the specific communities mentioned:
10. Were you spotted as a shopper by the representative?

If yes, at what point during your visit?

SUMMARY

1. Briefly summarize your impression of both the apartment, and the representative.

2. What have you learned through this exercise that will help you to do your job better?