

Training Methods

- **How are you delivering courses to your team members? What is the impact on your department as a whole during this economy?**
 - Saris Regis – 80% Classroom – sent survey to employees and found that they like classes better. They have a facility in Irvine and go to properties for remote locations; also implemented mentoring program
 - Greystar – 70% Classroom, 15% Web/Instructor, 15% Online/On-demand
 - Avalon – 70% Classroom, 30% Web – due to layoffs and budgeting they are going to 100% online; will reinforce OTJ training, mentoring, utilizing SMEs
 - Riverstone – when they grew and added 15,000 units they moved more training online. When from 100% Classroom to 10% Classroom, 90% Online, then changed back because it was not working.
 - BRE – research says it needs to be a blended approach. 70% Classroom, building additional online and blending.
 - Riverstone – in the virtual office there is no love. There is a disconnect when trying to teach sales or soft skills.
 - Windsor - 25 % Classroom/Instructor led, 34 % Web/Instructor led, 20 % Grace Hill, Orientation, MRI I, 20 % 1:1 Training , 1 % Outside Seminars
 - Gables – uses lots of blended learning – 50% Classroom, 35-40% Web, uses virtual followed up by workshops. Sales are not online. Maintenance service training is 90% Classroom. Overall, doing a lot more “chunks” of training as opposed to full days.
 - Greystar – how to get managers involved in the transfer of learning?
 - BRE – looked at top sales people and asked what they liked in training. They responded classroom, online and short on-demand segments.
 - Prometheus – 50% Classroom, 20% Web/Instructor, 10% Online.
 - Riverstone – hard to have classes due to the size of their company and geography. They tried web training for remote locations and the skills and evaluations were lower. The employees did not have as much buy-in. Example of way they got leadership buy in: they offered lots of leasing classes in 1 market for 1 month. After 2 weeks the employees rented 616 apartments which was triple the normal amount.
 - Lyon – 50% Classroom – shortened the time or amount of days; part of their testing is to conduct a tour or role play mock sales scenarios.
 - Windsor – after sales classes do special shops through EPMS.
 - BRE – host TTT training every year; regional maintenance trains and they have a Regional Manager sit in on some classes to give feedback. Field trainers get busy with other duties so they have to keep tabs on them; BRE has 1 full time Maintenance Trainer and 18 Field Maintenance Trainers.
 - Maxx Prop – grounded in 2009 – only 2 trainers covering 7 states; 80% Web/Instructor Led
 - Windsor – have filmed some videos, example HVAC Pump Down, produce with Windows Movie Maker and post to the Intranet. The video websites we are using for maintenance:
 - <http://hwtv.jlconline.com/>
 - <http://www.monkeysee.com/>
 - Sunrise – 50% classroom, 40% Web, 10% Online

- Simpson – 70% Classroom, trainers were getting burned out so they set a schedule annually; built an online on boarding program; mid-level director of training quit so they company downsized and did not replace; looking to purchase some curriculum; web/instructor led did not have as good participation so they shortened classes.
- Gables – Uses captivate, camtasia, articulate, rapid elearning – for creating elearning coursework.

Outside Resources

- **What third-party resources do you use to deliver online courseware?**
 - Lyon – Grace Hill, GeoLearning, Skill Soft, Mind Leaders – sexual harassment
 - Windsor – who do you use for Pandemic Training?
 - Gables – had to shut down 2 properties due to H1N1
 - Avalon – Grace Hill; Workplace Answers, Cornerstone LMS
 - Maxx Properties – EPMS’ supplemental sales training
 - Greystar – Call Source
 - Simpson – Call source was cost prohibitive for them
 - Riverstone – eLearning LMS
 - Greystar – Grace Hill, EPMS, Webex recorded sessions, looking into Captivate, uses Gemini and can customized online courses – can pick and choose courses and then customize, uses for Orientation, classes can be hosted on your own LMS or on Gemini’s site. It is a \$/unit.
 - Gables – Grace Hill, Pure Safety (many language options), everything else is built in house. They do all OSHA, safety and diversity through them.
 - Prometheus – EmTrain?

- **Do you utilize third-party speakers or services to compliment your in-house training program? If so, which ones, and how frequently?**
 - Prometheus – Undergoing a rebranding campaign – uses Clark Work Company for their external branding and Owen Jones for Internal; also uses Westfield Shopping Center
 - Avalon Bay – Lori Snyder (Denver), Terri Norvell (has new maintenance & leadership stuff), Bill Nye, Dan Thurman.
 - BRE – Sam Glen, Scott Blanchard, Lisa Trosien – does sales conferences 2x per year. They do monthly webinars w/ speakers (Anne Sadovsky), Scott Blanchard – KendBlanchard.
 - Venterra – does Lunch & Learn Webinars – did one with Anne Sadovsky, uses GoToWebinar – can track attentiveness
 - Lyon – gave associates the option of a live meeting for an online option. Many chose the online option because it saved time away from the site, gas, etc. They still like the interactive option though.
 - Greystar – Joel Zeff (Dallas), Jackie Ramstedt.
 - Riverstone – Tammy Siewruck, Kate Good, Mark Cukro (maintenance speaker and training – he will certify maintenance trainers), Price Is Right-type game at an event (Bryan Quinn, President – The Ultimate Game Show, www.ultimategameshow.com, 866-4-GAM-SHO [866-442-6746]), Eric Wahl.
 - Windsor – Donna Hickey, Jackie Ramstedt, Dan Thurman.

Technology

** BRE brought up that Craigslist is working on a system to start charging. Minimal, but will charge.

- **Property Management Software:**

- What program are you using?
 - Yardi - Lyons, Riverstone, Greystar (75% of properties), BRE, Maxx
 - MRI – Windsor, Avalon, Simpson, Riverstone, Greystar (some properties), IMT
 - Real Page/One Site – Greystar (JPI sites), Sunrise, Sequoia, Prometheus
 - Insignia
 - eSite - Venterra
 - Gables – in house

- **Call Centers / Online Leasing / Lead Tracking**

- Level One – almost everyone uses
- Cross Fire – Sequoia. Saris Regis started and then stopped using it.
- Lead Tracking Solutions – Saris Regis – has some call centers but they are not integrated
- Lyon – Level 1, Lead 2 Lease, Yardi
- Simpson – implementing Lead 2 Lease (3 properties), used years ago but quit because it was not integrated, uses Property Link – endorses it because it gets the job done and is very cost effective
- BRE – FYI - Craigslist is getting ready to charge for listings
- Vaultware – Gables, Greystar – Windsor is rolling out
- IMT – Lead Tracking Solutions is fully integrated, creating a grid to compare several options, offered to share with everyone
- Greystar – using lots of systems, it is challenging ensuring that everyone is trained and actually using them correctly
- Prometheus – challenge is how to get Level 1 Reps up to their standards
- Avalon – On shops, they track that associates contact the shopper to schedule an appointment.
- EPMS – can send scenarios and fake leads to Level 1 and then can do a shop report on the follow up call by the associate.
- Greystar – Internet shops assess Level One and the associate for a combined score.
- Simpson – has Level One do online leasing; they can walk a prospect through the process online and get them to complete the application.

- **What guest card is everyone using? Are you going electronic?**

* Fair housing was brought up – risk if eliminated the guest card.

- Lyon – are associates engaging the prospect or focusing on typing it in the computer if electronic versions are used.
- Greystar – they have both; if there is not a manual guest card there is concern about sticky notes being used.
- Riverstone – there is a need to keep guest cards for Fair Housing purposes. They have clients sign guest cards so they cannot claim we are telemarketing.
- Greystar – some sites do not have enough computers or printers available to go to an electronic guest card.
- Avalon – use guest cards

- Simpson – Lead2Lease guest card can be customized; Lead2Lease is great to use for leasing contests
 - Ventera – uses prospect logs
 - BRE – Level One will call their email leads if they have been going back and forth. They use Yardi for lead tracking to prompt for follow up.
 - Ellis – Follow up trends: calls are about the same (60% do not get made), emails have gone up and cards have gone down.
- **What did the top sales person make in your company?**
 - BRE - \$85,000 – they are paying a lower base and higher commissions for some sales people. Have created tiers. (Leasing Consultants vs. Leasing Specialists cs. Customer Service Reps.) Net contract value. Hires Leasing Specialist and will train/grow other consultants into the role. Customer Service Specialists handle the paperwork and renewals.
 - Simpson – tiered program: lower hourly with higher commissions, they did this with renewals too. They have about 78% in tier 1. There has been about a 38% decrease in employee turnover. Top salespeople get certain perks, ex: going to NAA with all expenses paid.
 - Greystar – Sales managers should make more than managers.
 - Simpson – Created their own behavioral testing system.
 - Windsor – Does Helms Greco testing.
 - Maxx – Maxx Millionaire Club – sell a certain amount within a timeframe and then the associate will receive higher commissions. Uses standard deviation to level the playing field with different size properties, etc.
- **Yield/Revenue Management:**
 - LRO – Windsor, Avalon, Simpson (on it for 5 yr), testing at Gables, some Lyon.
 - Yieldstar – Saris Regis, Greystar.
 - BRE, Maxx – None.
 - Most companies use either LRO or Yieldstar
 - Saris Regis – adjusted their shop questions: Did the associate provide a quote on the initial lease term? Did they ask if you were flexible? They also incorporated Yieldstar in sales training for new hires. Upper Level Management – meets with Pricing Revenue Manager to go over reports.
 - Simpson – Pricing Revenue Manager attends all budget sessions. They did a reforecast of their budgets twice last year.
 - Windsor – on shops, have to mention that prices change daily. Helps with built-in urgency.
 - Gables – are customers balking when they see prices changing online?

Instructional Design Standards

- **Do you have Instructional Design Standards? What are they?**
- **How are you measuring on the job transfer and increased performance after a learning event?**
- **How are you breathing new life into your training materials?**
- **How have you changed your training to keep up with the changing customer:**
 - BRE – distributed an Intulogy handout
 - Have Instructional Designers: Avalon, Gables, Simpson, Prometheus, Greystar
 - Prometheus – front end assessment, identify needs, develop program (use SMEs), use Leader Guide Pro to build facilitator guides, does Alpha/Beta testing with SMEs then test with the customer base. This is approximately a 4-6 month process.
 - BRE – Instruction design process: build a document with the customer so you know what they want. Will share the process sheet. The process takes approximately 6-7 months.
 - Simpson – Uses Survey Monkey for post testing
 - Gables – has an Excel document; the phases of the design process are on different tabs, will get signoff on each section of the process.
 - Greystar – We should create a Yahoo Blog share group
 - Maxx – Has a syllabus for each course; sends to COO and Regional Managers for input
 - Prometheus – Organizational tracking; has a training score card
 - Riverstone – Report card systems; for their Leadership Program they monitor performance after class over 90 days by looking at occupancy, turnover, meeting goals, delinquency, measureable points from reports, benchmarking of property managers.
 - BRE – Standard Operating Metrics for Sales and Business Operations – has to have communication with managers
 - Venterra – review property managers leadership, goals, shops; Conduct quarterly audits – use this to create scorecards and will rank their managers. Conduct audits of leasing consultants every 6 months. Recruiting created the metrics into an Excel spreadsheet. Bonuses are based on the rankings. Create improvement plans for the bottom 10%. Really helps to know where their training needs are.
 - Riverstone – Create report cards using desk auditors, Yardi, surprise field audits, maintenance shop inspections – go into a central report and is ranked by Regionals and then VPs. Publish these reports quarterly.
 - BRE – Uses Articulate for testing that feeds into their LMS. Looking for ways to assess the scores. What question is most missed? Why? What’s missing in the training?
 - Greystar – Knowledge vs. skill gap – sometimes can get a good score about closing but then not be able to do it.
 - Riverstone – created “Coach a World Class Shop” provides training on how to help their managers do effective shop reviews with associates.

Leadership

- **How have the following roles changed over the last year from a training and accountability standpoint?**
- **Do you have a formal or informal leadership training program?**
 - Riverstone – more mentoring vs. classroom; especially for maintenance

- Greystar – they have some corporate people who do mentoring, 1:1 leasing evaluations, audits, can be on a takeover team, and help with on boarding. The cost for each corporate person is split between the sites. Also looks at defined “Pillars” of their company and performance to determine training needs.
 - BRE – Field trainers - utilized approximately 10 – 12 days a year; work with regional trainers, field trainers to not get paid.
 - Gables – uses www.thank.com
 - Windsor – uses Academy Trainers as field trainers. They get prestige and \$100 per day of training.
 - Saris Regis – mentor requirements; wants to implement a requirement this is measurable so they can continually reassess. Usually tenured employees mentor. If an associate’s performance is struggling they will utilize Grace Hill, training classes and mentoring. They also use mentors for career pathing. Has a mentor request form that has the reason and approval by the Regional Manager. Then they will pair them.
 - BRE – Regional Managers pair mentors; also has a Manager in Training program that consists of 12 months of classes and then a 2-month internship in the new role.
 - Venterra – Has a scavenger hunt for new positions.
- **How do you successfully onboard new team members into the organization?**
 - Avalon – within the first 2-3 weeks they must do training, 1 day of orientation and 3 days of leasing basics
 - Prometheus – on boarding/orientation
 - Windsor – Orientation I online and then 1 day of customer service training and 1 day of sales training
 - BRE – Everyone has to go to Orientation on Day 1, Maintenance and Leasing on Day 2, Sales days 3 – 5; associates cannot do anything until they have been trained.
 - Riverstone – online for orientation & benefits; there are restrictions until associates have completed certain other trainings, ex: leasing
 - Gables – ICIMES – used for new hire paperwork (forms can be completed electronically)
 - Greystar – ADP

LMS

- **What type of Learning Management System is currently in place within your organization?**
 - Avalon – Cornerstone for 3 years (has problems with computer support)
 - Gables – learn.com – has been on since June. It is consumption based pricing; \$3/person, 70% success rate.
 - BRE – Sum Total for 2 years; problems with reporting not working
 - Riverstone – eLearning
 - Windsor – Training Wizard but will be switching to Grace Hill
 - Venterra – no LMS; uses Excel; suggested looking into moodle.com as a free resource.
 - Lyons – Training Management Software
 - Prometheus & Sequoia - GeoLearning
 - What is tracked? Training, shops, performance reviews
 - Shop accountability?
 - Lyons – 3 and you might be out!
 - Below 85% on Telephone
 - Below 90% Onsite

- Below 70% - 1x performance counseling, 2x training, 3x meeting with manager
- Ellis – will send out report with shop accountability practices.

Social Media

- **Are you using social media for learning? If yes, how are you using it?**
- **How are you controlling it? Have you established standards and guidelines from an operations and HR standpoint? Do you have a social networking policy?**
 - Lyons – no access
 - BRE – no access
 - Gables – SPOT Tweets: “Shaping Professionals, Optimizing Talent”
 - 2nd Life?
 - Avatars for web meetings? Grace Hill uses them.
 - Facebook – nobody is using for learning.
 - Some are posting blogs on LMS.
 - Gables – had a scientist do a study of Gen Y for a year. They want to be trained on life skills, they want their careers pathed, want personal and professional life to blend. We have to teach them what is acceptable and how to separate.
 - Prometheus – Sun Learning Systems – used to exchange information, can post information, users can rate it, give out rewards based on ratings. Wiki on the Intranet.
 - Sequoia – RapidFire Learning; Encourage employees to record 2 minute or less video clips, they post it to a site and employees can rate them like YouTube. They give out prizes to those top rated. They gave all sites Flip cameras.
 - Gables – has a training blog
 - Kate Good tip – give Flip cameras to prospects to record their favorite parts of the tour. Email them the video during follow up.
 - Greystar – will share their social media policies.

Rewards/Recognition

- **Has your rewards and recognition program changed from prior year? In what ways?**
 - BRE – Celebration of Excellence – employees can bring their families, they receive awards. Have not cut back on recognition.
 - Avalon – 1x year host an event where employees can bring their families. Usually at a beach or park. No holiday party this year.
 - Saris Regis – Employee Recognition Day – gave them a pass for a day off that they can choose when to use. They don’t have to close the offices either.
 - Avalon – used feedback from their Kingsley employee surveys to tweak awards
 - Riverstone – You Rock Awards – can send an award to a peer on the Intranet. Employees are recognized based on who sent and received the most rankings.
 - Saris Regis – Bravo program
 - BRE – B Value Buck Program – enforce creating valuable experiences for prospects & residents. Regionals get bucks quarterly. When they catch an associate doing something good they can award a buck. The buck gives the associate 30 minutes off. The Regional must complete why and submit appropriate paperwork to payroll.
 - Prometheus – OC Tanner – Carrot Principle

- Gables – tenure awards – give associates a day off. Recommends the Carrot Principle. Thanks.com
- Windsor – used virtual rallies this year. 1 per region, 2x year; used the web meeting with photos to announce awards. Offices closed for the rest of the day. Associates had lunch together and received the afternoon off.
- Lyon – 1 per year
- Ventera – sponsored a Susan G Komen team; had activities to raise money throughout the year then they created t-shirts and associates got to walk the race.

Next Year

- **Mid September**
 - Napa
 - San Francisco
 - Boston
 - Atlanta
 - Denver