Educational Brainstorming
October 19, 2011
Discussion Sessions

TOPIC 1: Change Management and Performance Expectations

- **What are companies doing to help employees drive their own learning?**
  - Relooking at onboarding and training, to include self-directed options such as online, webinar, and video; incorporate some group training still but relying more on one on one training
  - Individuals in each department have the opportunity to become a subject matter expert
  - Camden & Greystar – TRN department teams up with other departments help drive learning
  - Popular techniques: On-demand modules, online training, peer coaching
  - Changes to the recruiting process – informing new hires 'you drive your own success'
  - Offering increased pay for completion of training
  - Concord - Core courses plus additional 2 to 4 courses (online on demand) that their employees can choose
  - Sequoia- Career path to further advance their career
  - Ray A, Prometheus- Offer a series of videotaped training segments for different positions; all available online
  - Melanie O, Windsor – Grace Hill has an online portal for TRN
  - Chris M, AMLI - Driven to provide "now" and "quick"; created a reality TV clip to introduce their SMARTOffice component to their teams from the prospect POV
  - Maria L, Ellis/Melanie O, Windsor- Trend is "watch to learn"
  - Shellie A, CWS- Rolling out an "acclimation packet" which is a work at your own pace program, with 60 days allotted for completion from hire; no shops for first 30 days; then attend class for group discussion
  - Chris M, AMLI - Different types of follow up is required for different generations; TRN is on company intranet; quarterly training is employed
  - Windsor- Training Newsletter, once a month via email; use iContact for email distribution; RMs and CMs learn new material by teaching classes
  - Gables: Re-designing learning platform to let employees pick their own path; mandatory continuing education to keep on target; Gables pays for additional training (RPM approval required)
  - Greystar - In-house curriculum designer to develop Greystar-specific classes; developer works together with the software team to develop on-demand classes. Grace Hill is great but is not customized to company's specific policies and needs
  - Gables and Camden also have in-house curriculum developers

- **How are companies determining the right amount of training relative to cost effectiveness, and in conjunction with this has training been condensed?**
  - Information feeds through TRN, is funneled through executive leadership and then reinforced by operators
  - Utilizing test groups within the company
  - Necessary to identify what is a TRN issue and what is not; generally only 3% off issues are directly training-related
  - Reviewing job descriptions and performance expectations; re-educating on revised principles
  - Streamlining from 'classes for the masses' to individualized coaching for performance-based need
  - Windsor/Sequoia- Going back to more facilitator-led training vs. webinars
  - Legacy: Problem with class attendance; last minute no-shows; geographic location of properties makes it difficult for everyone to get together for class

- How are you conducting Fair Housing training?
  a. Greystar- Online on demand and annual re-assessment
  b. Concord- In person initially with annual refresher course online. Leadership training might include in-person FH training.
  c. Legacy- Lawyer recommended in CA to only offer in person FH training; sexual harassment every 2 years; FH every year (a 2 hour class).
  d. Waterton: every person in the company completes the annual classes in a specific month for topics such as FH, sexual harassment and diversity in the workplace
  e. Banner- Fuses training, both in person and online FH classes

o **How do companies ensure new programs or systems are rolled out and implemented consistently across the company? Buy-in/support/implementation from supervisors?**
  - Implement special support services/help desk after rollouts of training
  - Collaboration between departments (IT/TRN) and then rolling up to the corporate level for approval, followed by beta testing and refinement before full release; supervisors are ultimately responsible for implementation
  - Windsor – Executives are asked to teach courses
  - About 1/3 of participating companies are getting executives involved in TRN
  - Legacy - Training department is monitoring the implementation of new programs/software; Issues with RPMs who are not implementing all new programs
  - Sequoia: Holds a three-day "envision" meeting for planning
  - Shellie A, CWS - executive level planning session; pick 4 or 5 mandatory objectives for the coming year; everyone leaves aligned so a united front can be presented to the sites; there are quarterly follow-ups throughout the year
  - Chris M, AMLI - Brainstorming with onsite teams first, then roll up
  - Gables- In person manager meeting; same presentation in every region ("Meeting in the box"); received great feedback from managers on this
  - Concord - Three-hour back to basics meeting with Portfolio leaders (CM, service supervisors, etc.)
  - Legacy - Issues with budgets if owners don't want to pay for meetings, or webcams
  - Windsor - Communication is important between the different departments (training, marketing, IT, etc.)
  - CWS - Recently rolled out a big amount of changes; TRN took over some of the responsibilities of monitoring and checking on implementation because DMs we busy with operations
  - Greystar - IT, Marketing, TRN are different departments but work together under support services. TRN works with executive level to develop initiatives for training
  - Liz S, Concord - Consistently go back to the beginning to make sure everyone is following the guidelines set forth, from the bottom up; asked that their employees completely shut their cell phones off when in training, not just on silent mode
  - Ray A, Prometheus- The CMs are the most important as they have the day-to-day interaction with the customer
  - Do you have a safe forum for people to ask questions?
    a. Greystar - Help Desk tickets; Questions go to several different people/different departments if they don't know who to ask

o **With the value of "soft skills" – emotional intelligence, creativity, innovation, agility – so important, how do companies get the C suite to listen and provide resources for training those traits?**
  - Rather than defining how to do it from the top down, host focus groups onsite and share information to take back to corporate
  - Most companies are using People Answers to test for aptitude in soft skills
  - Liz S, Concord - Trained in soft skills in early 2004 but went back to the basics; focusing more on upper management, being exceptional, collaborative but only at the top level; went away when downsizing at top management level
  - Alicia PM, Greystar - Start at a lower level, asking for feedback from the leasing professionals
  - Jennifer C, Waterton - Start at the community management level and ask for feedback.
  - ALL- Agree you must have management buy-in.
  - Pam S, Windsor - Community managers will make or break your training
  - Liz S, Concord - One person from HR (a trainer) in corporate meetings

- Alicia PM, Greystar - TRN is the filter from the top to the leasing agent; empower LPs by including them in the progress and decisions
- Pam S, Windsor - Managers are key but have to keep communication open with what is going on; had wait lists for their training once they started asking for input on training at all levels
- Liz S, Concord - The mentality is "when something is broken, give it to training"
- Anne B, RAM - Difficult to get the top level together and are very old school when it comes to training
- Alicia PM, Greystar - Follow their Six Pillars of Success; by consistently following throughout the entire company, it helps them all to stay on the same page
- Colleen L, Banner - Did a series of focus groups of various levels and results were shared in an open discussion where brutally honest issues were discussed. From this, they were able to learn what their employees wanted/needed
- Pam S, Windsor - Has used an outside company to survey their residents
- Liz S, Concord - Just trying to get everyone to be civil was an issue; mentioned the book *Why Can't We All Just Get Along?*
- Colleen L, Banner - Use a personality questionnaire
- Liz S, Concord - Struggle with what's acceptable *(i.e. tattoos, piercings, etc.)*
- Liz S, Concord - Receive a lot of push back from technology when trying to push for creativity
- Colleen L, Banner- In the up and coming movers and shakers, they are trying to teach them to be a little more creative
- Jennifer C, Waterton - They use a specific check list with new hires that addresses some soft skills

o **How do your teams really master what is taught? What are the best tips for mastery?**
   - Restructure mentor programs, assigning based on their strengths in certain areas rather than a general "expert"; provide one on one reinforcement after failing shop
   - Provide multiple formats for mastery; gauge results, and seek feedback from the trainee on the value they perceived from the products/processes
   - Training while immersed in the work environment; put responsibility on CMs for reinforcement
   - Shellie A, CWS - Ask for feedback from the trainee after 45 days, when there was been time for implementation on-site
   - Pam S, Windsor- Have trainees rate CMs on how well they supported them after TRN
   - Shellie A, CWS - Hold the CMs accountable; have them sign off on post-class requirements; give one week for follow-up at the property level after TRN
   - Abby H, Sequoia - Assign "specialists" based on experience and training to trainees to follow
   - Melanie O, Windsor - Mock telephone calls are good experience to test skills
   - Shellie A, CWS - Has a "champion" in each region by topic, rather than mentors assigned per person; visits properties to 'learn, teach, lead' for failing shop scores; LPs are more comfortable with peer coaching; champions receive recognition but also are delegated responsibility for developing recognitions/rewards within their own regions
   - Ray A, Prometheus - Utilize the Gilbert 6-Box Model for performance intervention is essential; 85% of issues are external to TRN; Operations uses to pinpoint areas in need; recommended by ASTD; available on company intranet for use

o **Does education/training function align with business objectives/strategies or drive training through informal agendas?**
   - Melanie O, Windsor - TRN needs are in flux from year to year and focus is ever-changing
   - Chris M, AMLI - With more acquisitions and more developments, simply more TRN is required; must streamline for efficiency
   - Going back to the basics; inciting all levels of management including RMs and Execs, examining policies and practices to identify areas for improvement

o **Are companies "truly" coaching teams for performance? What "value-add" trainings are being introduced to grow and develop the team?**
   - Karen N, Riverstone - Created a value-added module to their training for high-end communities
   - Patrick N, Greystar - Getting back to value selling; creating a connection by checking in on residents after 90 days rather than waiting until renewal time; ask that each CM pull 5 files a day to check in and focus on relationship building

- Christina S, Simpson - Going back to true customer service; understanding what the customer wants and needs and focusing on exceeding their expectations
- Penny E, Banner - Purchased a company that did everything online, and when they introduced their on-site customer service, the residents were shocked and overly satisfied with the change back to human interaction
- Follow-up surveys post onboarding/TRN
- Developing Action Plans and ensuring they are followed; put the responsibility on CMs
- Many companies are moving away from classroom training serving the primary role

TOPIC 2: Blended Learning

o **Have companies altered current basic class curriculum to adjust for generational differences (Millenials represent approximately 36% of workforce now but to increase to 45% by 2015)? Should or how do training courses change based on current assumptions about generational differences, especially given the Milennials grew up on technology and gaming systems?**
- Everyone is having to go back and re-focus on the customer and the relationship
- Shellie A, CWS - Teaches marketing planning class to CMs (generally 18-25 year-olds); they are like sponges and really want to learn
- Patrick N, Greystar - Curriculum has to change constantly; refreshers are vital; integrate RMs so they understand what the site people are going through; TRN is a 'battery recharge' to middle management
- Sherri C, Greystar - Boomers and Gen X need to be taught how to work with Millenials; Millenials are judged for not doing when we fail to give proper direction
- Patrick N, Greystar - CMs must be shown how the success of their on-site leasing staff contributed to their success as leaders at the property level
- Shellie A, CWS - Veteran CMs and RMs need to go through the TRN offered to new hires as training programs change, so you can ensure they "get it"
- Alicia PM/Patrick N, Greystar - Operation and software courses online are helpful; both require and elective courses, and both full and half day courses are available; also utilize a mentor program; brainstorming in smaller groups and including the Gen Y employees on their "terms"
- Emily C, Windsor - Offer WebEx classes due to budgets being cut as opposed to on-site training
- Christina S, Simpson- Webinars seem too long and not as successful; had good intentions with online training but are revisiting in person training
- Karen N, Riverstone - Utilize more in person training
- Amy R, CWS – Did a cost analysis on training in person (travel) versus the equipment required to adequately utilize video conferencing; have moved some things like benefits discussions to video conferencing
- Penny E, Banner - Did focus groups to determine the biggest training needs. Because of this, they are doing more on-site training
- Alicia PM, Greystar - In WebEx you can share the screen with the remote attendees
- Penny E, Banner - Use Log Me In to share for one on one
- Emily C, Windsor - Have used Chief Mobile, which is a tested curriculum
- Karen N, Riverstone - Use their own in-house curriculum
- Alicia PM, Greystar - Offer leadership training with anyone who is interested and tailor to the generation involved as well as the learning style; adjust the curriculum based on the individual's needs
- Amy R, CWS – In the process of building their own training program

o **How do you determine what new training or learning events are needed for your business? Who is involved in this decision making process? What are these learning events? Are they effective? What's the turnaround time from approval to delivery?**
- Chris M, AMLI - Conversations with CMs/RMs; what do they see as a need; get buy in at the site level, then brainstorming with Education team
- Pam S, Windsor- TRN for new technology takes precedence over other needs
- Karen B, - TRN develops a needs analysis from surveying monthly meeting participants; develops based on site need
- Abby, Sequoia - TRN is predetermined by the needs of other departments and developed based on that
- Shellie A, CWS- Operations drives TRN; 1 trainer for 16K units

- Stephanie PH, Greystar- Operations driven; TRN made suggestions for 2012, but it starts with the business planning process and builds from there; then TRN must decide how they best can support the operations objectives; TRN is a partner in the process
- Akilah B, Greystar - TRN keeps a pulse of what's going on at the site level and what RMs observe as a need
- Chris M, AMLI - After a need is determined, it is TRN responsibility to develop the package/presentation *(i.e. the strategy for delivery)*
- Patrick N, Greystar - The information received is freely discussed with trainers to modify the training curriculum. There's constant evolution as you have "got to stay fresh"
- Maria L, Ellis – Historically used focus groups with employees at 6 months from hire date before bad habits were formed; stopped using things that weren't working and listened for new ideas; worked with the front line to see what their day to day was like and what worked best for them
- Christina S, Simpson - Did focus groups to reconfigure how to add all levels of staff. Maintenance did not want a mentor program but rather a task list; they took this into consideration for working at that particular level
- Chris M, AMLI - What your customers are saying about you is a big driving force to TRN needs assessment
- Pam S, Windsor – Turnaround with pre-packaged TRN is about 4-6 weeks; always review off the shelf product before releasing to ensure consistency with company objectives
- Abby H, Sequoia - Gets asked to roll out start to finish in a matter of a week or two sometimes
- Chris M, AMLI - Timing is relative to stated need and approval process; could take 3-6 months start to finish for development

o **Are companies really "touching" every position a few times every year? Suggestions for successfully "touching" every person a few times every year? Should learning tracks expire for tenured employees – do to do with those long term employees?**
- Camden - Offers Leadership training
- Banner - Utilizes focus groups; 120 Questions – 12 minutes
- Every three years, team members should go back through training; more frequently if major changes are made to processes or software, etc.
- CE program – Learning Tracks
- Content refresh; reach out to top performers and perhaps even to "B" performers
- Everyone should be touching each employee every year
- Concord - TRN is not always offered to all positions, such as housekeepers or groundskeepers
- Question: How do we get our team members to attend training?
  a. Waterton- Mandatory training classes; training is NOT an option; even if completed TRN repertoire they can repeat or enlist in new classes available; assign refreshers for portions of whole classes that were not completed successfully
  b. AMLI- To keep their destination they must attend training; class attendance is tied in with their performance evaluation

o **What have been the most effective training methods to address leasing communication via email, particularly in a situation where members of the leasing team are not good communicators/writers (e.g. Millenials)?**
- Banner - One on one coaching; catalog of real leads as samples, along with written responses
- Camden - Converting 8-hour courses to 4-hour courses
- Post- Uses real emails sent to prospects to TRN for appropriateness of the response in an in-person interaction
- Offer basic grammar and writing classes
- Concord - Hires Spanish-speaking associates
- Combination of facilitator led training, online training, videos, workshops, forums seems to work best
- Ray A, Prometheus - Forums: within the intranet, not anonymous, and include a rating function
- Concord - Difficulty reaching maintenance with blogs even if they have their own email address
- Alicia PM, Greystar - Have to make sure that there is no "tone" in the emails sent out
- Karen N, Riverstone - Use templates for emails but encourage some personal additions so it's not too canned

- Patrick N, Greystar – If using emails, have to make it your own and encourage personality in the content
- Recommended Tools:
    a. Camtasia
    b. Articul8 Studio

o **Should support tools be communicated in every venue (e.g. manuals, message boards, internal social network, recorded video) and for every topic?**
- Sequoia - Utilizes a Wiki Q&A system; employee posts a question and other employees respond in answer
- Windsor - Uses monkeysee.com
- Camden - Has a message board, blog, and on-demand training
- Companies offer on-demand maintenance TRN videos
- Partner with your insurance company to provide some TRN videos
- Offer "peer trainers" who can provide immediate feedback (esp. for Millenials)
- Banner - Uses brainsharp.com
- Melanie O, Windsor - Has used Achieve Global
- Greystar - TRN serves as a coach in the onboarding process

TOPIC 3: Impact of Technology on Sales, Training, and Marketing

o **How do companies see social media playing into your training efforts now or in the next few years?**
- Social media does not seem to be "working" as a TRN medium
- Banner - provides each employee with a "training buddy"
- Obstacle is measuring ROI on social media
- Gables & Camden - Successfully utilize corporate blogs and manage internally
- Gables - properties have Facebook pages.
- Post - Only 5%-10% of properties have Facebook
- Greystar: CA properties all have Facebook, but this is not consistent throughout the company. Some sites have a 'social media guru'
- 30% of participating companies have social media policies in place
- Coca Cola's social media policy is published online
- 40% of participating companies are managing social media as an aspect of their sales, whether in-house or outsourced
- Camden - Three employees dedicated to social media operations and oversight
- Amy R, CWS - Starting to recognize mediums like message boards, blogs, and more informal communication methods/social media
- Penny E, Banner - Utilize a blog for their communities
- Amber LD, AMLI - It's unavoidable; people are fascinated by applications for smart phones as well as tablets
- Ray A, Prometheus - Using a tool called Yammer, which is a collaboration tool; half instant message and half workgroup; guidelines are established for acceptable use
- Patrick N, Greystar - Knows of a company using a Twitter account to disseminate information to employees
- Ray A, Prometheus - Before any training is concluded, they set up a virtual community for ongoing communication amongst trainers and trainees
- Emily C, Windsor - Using a message board for community to community communication; all staff can access.
- Emily C, Windsor – Using Sherpa for SM aspect
- Karen N, Riverstone – Have set guidelines for social media interaction in the workplace

- o **What types of platforms (leasing tools) are being leveraged through technology at the site level? Have these platforms impacted payroll expenses and/or on-site head accounts? Benefits or disadvantages? What has been successful and what has been most challenging?**
  - Technology has made the guest card process less user-friendly; Boomers don't like transitioning to a tablet (iPad)
  - Camden - All paperless; documents are e-signature
  - Amy R, CWS - paperless; went to online leasing, YieldStar, and paperless office all at once; stopped rewarding on "close ratios" and started rewarding for traffic tracking to get buy-in
  - Windsor- Using guest card in OneSite; through TRN the associates will get used to using the computer verses completing the paper guest card
  - Offsite contact centers, often outsourced, can provide 24/7 customer service
  - Property Solutions - Integrated with Yardi; sets up as an App
  - Camden - 85% of communities on ACH, with no drop boxes for rent
  - Residents willingly incur the ACH fees for the convenience of online payments
  - Banner - Benchmarks everything, including email response and shopping scores (75% or higher minimum)
  - Tammy G, Sequoia - Each of their communities has a Kiosk and iPads for leasing; residents have the option to opt-in on receiving texts as their main form of communication
  - Akilah B, Greystar - Using their iPads to lease apartments poolside
  - Ray A, Prometheus - Specific to what the customer feels comfortable with; no sense in trying to lease on an iPad if they are more comfortable with leasing on paper; again back to putting the customer's preferences first
  - Tammy G, Sequoia - Mentioned the book *Social Media Cocktail* as a training tool; they use both Facebook and YouTube
  - Tammy G, Sequoia - Created an online ad campaign via YouTube called "Don't Get Chestered"; spoofs on what leasing professionals should NOT do
  - Amber LD, AMLI – Mentioned [Active Building](#) for their high-rise communities; also [Building Link](#); use [Relate 24/7](#) for email blasts to residents
  - Karen N, Riverstone - Would like to utilize [Skype](#) but IT department says no
  - Amber LD, AMLI - Skype was not a good source because of band width; mentioned [Global Crossing](#); said they were beta testing through Microsoft
  - Christina S, Simpson - Has used [Adobe Connect](#) for web sessions
  - Ray A, Prometheus - Using [Skype](#) for training and interviewing
  - More technology does not make payroll easier to handle
  - Understaffing is a concern; there are no longer bookkeepers on many sites
  - Gables - Electronic leases; one big national roll out; monthly re-training effort; suggests using a [ThinClient](#) (inexpensive computer) to facilitate better
  - What about iPads?
    a. Some use iPad for leasing, but others do not. Most are still in early and testing phases
    b. Sequoia - They are great for visual tours, furnishing floor plans; every property has at least one iPad; a few bigger properties have two; conducted in person training by marketing upon rollout, and is included in sales training now; **Yes, iPads are compatible with OneSite.**
    c. Gables - Starting to roll out tablets; haven't selected which yet
    d. AMLI - Doing a pilot to implement iPads; feedback was that the tablet takes away the attention from the lease process/ property *(i.e. "Shiny Object Syndrome")*
    e. Banner - using iPad; also rolling out an upgrade to their main site for compatibility with tablet devices
    f. Post - Using a tablet should not change the sales process but is a tool to help you lease; essentially replaces the leasing portfolio
  - What about Kiosks?
    a. Colonial - LP couldn't incorporate the kiosks into their leasing process but they were very helpful when the office was extremely busy
    b. Windsor - Shopped properties with kiosks; using the kiosk was "pushed" instead of providing that personal attention
    c. Concord - Also shopped properties with kiosk; kiosk was great for the virtual tour and provided wonderful angles of the model, but when took actual tour did the property did not present as well as over the kiosk
    d. AMLI - Kiosks are supplements but do not replace LPs; need to understand staff head counts won't change even if adding kiosks to the site

e. The 'iResident' is a real possibility due to technology, but it is an unlikely scenario as people still want to talk to people
- What about telephone interactions while using online/electronic guest cards?
  a. Windsor - LPs will need headsets
  b. AMLI - LPs do not use headsets
  c. Post - New people are easy to train; change is always difficult for veteran employees
  d. Gables - Still using paper guest card
  e. Post - Allows new LPs to use a telephone log to fill in the information before entering the information in Lead2Lease
- What about Reputation Management?
  a. Camden is using JTurner
  b. CWS - Uses a company who watches AptRatings.com and reports to them; will advise of negative feedback immediately and will respond for a fee
- About 50% of participating companies are using or testing iPads/tablets or kiosks
- Steve M, Banner - Rolling out behavioral tracking to understand shopping/buying habits of prospects (relatively inexpensive - $1K per 50K impressions)
- Do you have any webinar success tips?
  a. Use polls throughout for engagement
  b. Reduce size of webinar class
  c. Offer small pods of information
  d. Make more discussion oriented (2-way communication)
  e. Plan for icebreakers, interactive topics
  f. Set ground rules before beginning the class
  g. Have Quizzes, Questions
  h. Engage by using emoticons
  i. Enlist a co-facilitator
  j. Limit to 60 minutes or less in length
  k. No less than 15 minutes in length
  l. Have a "welcome" and roll call
  m. Utilize music

o **Are companies allowing on-site professionals to communicate and/or follow-up by text message? What has been your experience from a company and customer perspective?**
- Not many are using texting
- Texting more predominant on student properties
- Satisfacts surveyed 10K; 90% prefer email communication
- Greystar - Yes, but not in the western US *(due to legal concerns in California)*
- Sequoia - Texts only to residents for updates, not to prospects
- Most people have a smart phone and can easily access their emails from their phone, which minimizes the need for texting as a medium
- Effectiveness of text as a medium is dependent on the market and context/timing
- Amy R, CWS - Texting move-in updates, utility information, announcements of resident functions; accepted well by parents/students; one employee manages the push-out of texts
- Mostly outgoing texts when used, sent from online not from phones directly
- Greystar/Sequoia - Let customer opt-in for follow-up by text
- Tammy G, Sequoia - Using Irio; prospects contacting staff via text messages and they train to respond based on medium being used; biggest concern is making sure the leads are being answered via text when they are received that way
- Akilah B, Greystar - Struggling with texting shorthand *(i.e. LEET-speak; 'u' vs. 'you')* in communications
- Ray A, Prometheus - Suggests not using "canned" texts as they are not as well received
- Most participants asked their residents for their personal preference of communication types

TOPIC 4: Hiring/HR

- **How are companies incorporating training in performance appraisals and career path options?**
  - Alicia PM, Greystar - Reference shop scores as part of career training
  - Steve M, Banner - Training is more self-directed; you have to be committed personally to want to create a career path
  - Liz S, Concord - Have time-based required training to set/meet performance goals for career paths
  - Liz S, Concord - Utilize a two-page orientation check list due back to HR within one or two weeks of hire date; includes required learning and optional training; certain areas of training are mandatory to advance in career path; when employees attend training classes, they must be in business attire and cannot be more than 15 minutes late or they will be sent back to their property
  - Liz S, Concord - Accountability will be felt with performance goals or the lack thereof
  - Tammy G, Sequoia - Use Success Factors, which includes/excludes training courses taken/needed depending on career path
  - Caren D, Colonial - Utilize exception reports; an agent who has not taken certain mandatory classes can only earn 50% of their bonus until the class is completed
  - Stephanie PH, Greystar - Sends a report by RPM outlining which departments have completed and not completed certain training classes; defines top 5 and bottom 5 by shop and training; IT department delivers report so it's no longer the trainer being the "bad guy"
  - Krista W, Post - Training is not necessarily tied into performance review unless it becomes a career path issue; expectations are set and are very clear on what is needed to advance
  - Liz S, Concord - Career paths are clearly defined with what training is needed for each
  - Caren D, Colonial - Working on their career paths and matrixes for 2012
  - Tammy G, Sequoia - Emphasizes the importance of cross-training and hands-on training
  - Stephanie PH, Greystar - Do not have formal career paths; it's up to the individual
  - WWKRD - 'What would Kenny Rogers do?'; know when to hold 'em, know when to fold 'em

- **Have there been changes in companies' hiring practices with a bigger push towards customer service? Are companies looking for a different type of person for the office?**
  - Through technological advances, we must continue to focus on the customer, building rapport, and creating a relationship
  - Virginia L, Waterton - Consider hiring a person to handle the "paperwork", so leasing can focus on the sales aspect
  - Patti R, Camden - Bottom line is you still have to hire for sales, but ask follow-up questions to encourage dialogue to find out 'who' you are getting
  - Virginia L, Waterton - Using People Answers for refining/tailoring the process; referring to information when employees leave as well to see if there are patterns
  - Windsor - Moving to personality profiling as part of the process; learning what to look for based on the position being hired
  - Pam S, Windsor - Doing more job fairs
  - Stephanie PH, Greystar- Looking at high performers and reviewing characteristics from hiring process to try to better select candidates who will achieve the same outcome based on similar characteristics/profiling data
  - Shellie A, CWS - Look at turnover trends at the property level by region; redefine hiring practices if needed and look more deeply at who you are hiring
  - Chris M, AMLI - Suggests training to managers/supervisors on how to interview
  - Akilah B, Greystar - Interviewers must not only know what to ask but how to interpret if what the interviewee said in response to the question was appropriate
  - Providing personality profiles, if obtained for hiring, to TRN would be helpful in the onboarding process
  - Shellie A, CWS – Interview for sales aptitude on the spot; "sell me this pen"

- **What are companies doing to address the multi-generational workforce?**
  - Must stimulate TRN for all generations by incorporating lectures, group activities, games, and more

- o **What are companies doing for internal development programs and/or succession planning?**
  - AMLI - Offering TRN videos
  - Offer Leadership skills TRN opportunities
  - Employees "step up" to learning opportunities
  - Concord - Reviewing and revamping TRN modules to ensure they apply and appeal to all levels
  - Greystar - Sends surveys to all TRN participants
  - Take the team member out of the 'bubble'; put more managers and supervisors in TRN
  - AMLI – Each trainer is partnered with a department head
  - Patti R, Camden - Decreased turnover significantly by instituting mentoring for career development; one mentor follows the employee; additional mentors are employed as career path changes
  - Patti R, Camden - Mentioned the book *Developing the Leader Within You* as a resource
  - Virginia L, Waterton - Toastmasters
  - Sherri C, Greystar – Internal development is part of the onboarding process
  - Identify expectations of the individual during onboarding, then present options for self-directed progression; the responsibility is on the employee to take charge of their path
  - Colleen L, Banner - Offer cross-training
  - Virginia L, Waterton - CMs look at TRN for their people and provide feedback on progress
  - Patti R, Camden – Offers education reimbursement related to position
  - Virginia L, Waterton - Uses Afterburner, Learning Forward, and BlackOps; expensive but highly customizable
  - What about performance reviews?
    a. Sherry C, Greystar - Annual performance plans are created, with a mid-year and year-end evaluation
    b. Virginia L, Waterton - Considering moving to quarterly or monthly reviews
    c. Melanie O, Windsor - Use Ultipro for monthly evaluation, enters goals and sends email reminders
    d. Colleen L, Banner - Annual reviews including a self-evaluation; trying to convert to quarterly, but need to conduct TRN on how to do a performance review

- o **How do trainers balance course development vs. delivery?**
  - Remains difficult, as operations does not understand how long it takes to develop a curriculum
  - It helps to plan a quarterly or annual calendar that outlines time requirements for the upcoming period
  - Ray A, Prometheus - Within their yearly training calendar they have assigned course development months; e.g. October/November are months reserved to develop classes for the upcoming year
  - Legacy - Uses consultants to buy basic curriculum and then make changes to match company policies and procedures
  - Concord - In-house course development based on need assessment and trends observed
  - Sequoia - Splits time between marketing and training projects; there is no set time allocated for developing training courses
  - Legacy - Issues with purchased curriculum is that it might not work with your company specific policies and procedures, and it is very time-consuming revising the courses; often times you do not know that the class material needs revisions until the first time the course is facilitated

- o **What are companies doing to build employee loyalty/tenure? What are turnover numbers like at various levels? Do you see turnover increasing?**
  - Concord - Decrease in loyalty may be because of economy; after 10 years they receive $1000 bonus
  - Sequoia - 5, 10, 15, 20 year rewards (recognition and monetary bonus)
  - Legacy - Has a gift program run through HR
  - Simpson - Surveyed their employees through a focus group (10 questions, every region): number one thing people wanted were handwritten notes from CEO and president sent to their homes (especially maintenance); they also sought not just regional but national recognition
  - Develop incentive programs including covering health care expenses, recognition, flexible work schedules, etc.
  - Nurturing the teams more and working to resolve generational differences

Training Metrics

o **What metrics are being used to measure results?**
   • Many information metrics are being used.
   • RMs ask for feedback from their onsite teams and communicate to TRN department
   • AMLI – Transfer strategies and action plans
   • Waterton - Uses Grace Hill metrics

o **What performance metrics can be utilized for training?**
   • Scantrons provided for evaluation of TRN by participants
   • Zoomerang for surveys post-TRN
   • Chris M, AMLI - Post TRN surveys to participants; feedback from RM/CM levels
   • Camden - Employees are all surveyed every year about their experience with support staff/products

Other Topics & Wrap-up

o **How are companies dealing with the impact of generational differences as it relates to the employee and resident? What about the impact of generational differences on marketing in the future?**
   • Maria L, Ellis - Many Millenials did not have a job before 21; their time management skills and communication skills are not honed as they enter the workplace; they require positive reinforcement, corrective criticism, and ongoing direction.

o **Marketing Plans: Is the old marketing plan passé or state of the art? How are companies approaching marketing strategies at the community and regional levels?**
   • New marketing initiatives will be required, which will require even more TRN
   • Styles of TRN will continue to evolve
   • As generations mix in the workplace, TRN needs will increase
   • Continuing Education TRN is a necessity as technologies and trends grow at a more accelerated pace then the workforce itself
   • Employees will need to be adaptive but TRN will have to provide support

o **Social media and e-commerce marketing: Share best practices on social media and PR social media strategy. What has worked? What has not? Are companies using QR codes in their marketing? What types? How are they tracking? What is the ROI?**
   • Companies using QR codes have seen few results / little draw

o **What other products and vendors are available and recommended as "must have"?**
   • Virginia L, Waterton - RentMineOnline; online resident referral program, employs QR codes; inexpensive for ROI *(est. 3000% ROI in 2 yrs)*

Panel Discussion

o **Panelists**
   • Jennifer Antos, Gables Residential
   • Virginia Love, Waterton Residential
   • Amber Lovelace, AMLI Residential
   • Steve Matre, Banner Property Management
   • Ray Acay, Prometheus Real Estate Group

- o **What does the future of leasing look like to you in 2015?**
  - Gables - We will have more resources; still very much customer service oriented; face to face time still very important
  - Waterton - You need food, water and shelter, and we provide shelter; we will be centralizing a lot but on the onsite level not much will change in regards to face time with customers; technologies inundate us, but without the right people on-site, you can't do it; an entirely virtual office will not work
  - Banner - Sincerity and confidence will be important traits for leasing reps
  - Prometheus: Human connection still very important; focus is still on customer service; even those who lease online get a personal touch by phone/email
  - Banner - More leasing "sight unseen" in last 5 months than in last 5 years
  - AMLI - Yes, some will lease sight unseen, but we still have to focus on service – which is an art, not a science; automation and technology just facilitate more of a need for human interaction

- o **Onboarding**
  - Gables - Welcome orientation face to face; mentoring/shadowing; does not start on-site until after TRN; "Getting Gables Residents" – a day in the life of an LP
  - AMLI - A "village" approach is needed; orient at corp; HR does new hire welcome, peer trainer gets involved for 2 – 5 days before they ever go to site; continue reviewing new hire TRN checklist and work with peer trainer; check in by HR after 45 days; assessments at 30 days and 90 days from hire
  - Waterton - Get onboarding out of HR and into TRN
  - Banner - Start with CM; send to sales TRN as soon as possible; give a 30-day checklist to complete requirements; trigger online TRN components at certain points; follow-up 45 days after hire in person
  - Prometheus - Operations does onboarding; TRN only provides the tools

- o **Senior Leaders and their view of training in the next 5 years?**
  - Prometheus - Effective leadership training, generational training, service training and training based on customer demand; how do you inspire trust and develop communication to be perceived as genuine and authentic
  - Waterton - Focused this year on technical/software training; leadership training for next year
  - AMLI - Leadership training
  - Gables - Demand for Strategic Sales (sales without concessions); must learn to sell yourself more when you remove incentives from the picture
  - Banner - Train individuals how their behavior affects the bottom line

- o **Does higher occupancy mean we accept lower shop scores? How is TRN impacted by higher occupancy rates?**
  - Banner - People do get lax when occupancy is high; trainers are the motivators and cheerleaders
  - AMLI - What gets focused on gets done; explain that high occupancy is not a license not to sell
  - Waterton - Performance ties in with bonus; knowing their goals is important; you can't improve if you don't know what your goals are; reinforce not to be satisfied with the status quo

- o **Do you provide "job aids" for managers / explain how to review a shopping report?**
  - Waterton - In a perfect world every shop must be reviewed in person together with the manager, but it does not always happen this way
  - AMLI - Provide an A to Z explanation for how to review a shopping report to maximize performance
  - Gables - Created an e-learning course for LP who fail their shop; four days a month are reserved for personal development days where the trainer visits a site to provide one-on-one training to individuals in need

- o **How do you prioritize training demands?**
  - Waterton - If it has to do with leasing apartments, it's a priority; re-evaluate your personnel to determine if you can meet the current need
  - Banner - TRN makes an annual plan; sets up its own initiatives and timeline and rolls out as they can

- o **Who is responsible for different aspects of the training process?**
    - Gables - TRN is responsible for training to lack of skills, but we transition rollouts to subject matter experts
    - Waterton - Depending on the site level experience, some training can be transitioned to the property
    - AMLI - TRN creates the look and feel for branding purposes; strive to have a subject matter expert roll out or participate in the rollout
    - Prometheus - TRN is an advisor; each department does their own development and rollout

- o **Today's Customers … does our curriculum work with them?**
    - Banner - Because of the economy people don't trust big companies; we need to gain their trust and show value; only 20% of hotels are using a Price optimizer *(e.g. YieldStar)*
    - Waterton - Everyone is a customer: the UPS delivery person, owners, employees, etc.; we have to maintain enthusiasm in our technology and products and convey that to the customer effectively
    - Banner - The landlord is perceived as the bad guy; you have to combat and bridge that gap; customers want to be in the know; they need to be able to have confidence in us
    - AMLI - We need to help our employees become aware of all the resources available to them for communicating with the customer effectively and to simplify the process for them
    - Gables - Yes, it's getting the people to take advantage of the resources already available to them

- o **Is anybody moving to The Cloud?**
    - Generally, no. Gables is using to an extent.

- o **Who owns the employees' performance? Training?**
    - TRN is only responsible for skills and knowledge; CMs/supervisors own performance
    - Banner- Suggest using Pike's Transfer of Learning to convey to CMs how they are key to the process
    - AMLI - Sees value in follow up with CMs about TRN exercises
    - Prometheus - Operations sets the "rules"; if goals are not being met then TRN gets consulted; each individual owns their own performance