TOPIC 1: TECHNOLOGY / NEW INITIATIVES

- ❖ Since the last session (or within the last year), what new technology are you using? (New programs, software, systems, etc.)
  - Mercy (Susan) – Since they are a non-profit they do not put a lot of resources into technology; they are developing a SharePoint but are not maximizing the functions and features
  - Camden - SharePoint for prospects and residents
  - Camden - Uses a message board for peer to peer questions, and for mentors to communicate challenges and questions. Only mentors can log in to the mentor area. There is a program manager who manages it daily
  - Concord (Karen) - Uses SharePoint to share all documents. They have 20 team members who train/instruct in some capacity. They have an instructor page that shares all documents. They have another 18 community training associates. Started to develop marketing videos to get people interested. They are training on an express app. for Section 42 properties which expedites processing applications to 5-10 minutes instead of 24-48 hours. Has really impacted business
  - Concord - For LMS, did not like GeoLearning. Switched to UltiPro but that is going away. Now looking at Grace Hill.
  - Lincoln (Nicole) – Staff can hardly get comfortable with technology because it's ever changing
  - Gables (Rebecca) – Using tablets in five facilities to test impact on relationship building when on-site. On the phone, they prefer hand writing so there's no "typing" noise
  - Venterra (Stephanie) – Employees are assigned an iPad to use but they're responsible for the data plan
  - Sequoia (Tammy) – Every property has an iPad but they are not allowed to take them home
  - Venterra (Stephanie) – They are using Skype tours when prospects are out of town and so they can give a tour when it's raining. She said this works much more efficiently with 4G vs. 3G as Skype freezes up on 3G when touring
  - Venterra (Stephanie) – Uses Skitch to take pictures and email for maintenance needs and walk-throughs
  - Sequoia (Tammy) – Working toward Android devices for maintenance because they feed into RealPage
  - Sequoia (Tammy) – Uses Irio for texting, and she mentioned the book, *Social Media as a Cocktail Party* as a tool to train on how to text residents and prospects. Irio has an automated response and prospects can go through all the way to setting an appointment
  - Gables (Rebecca) – Mentioned Adobe Connect for team meetings
  - Lincoln (Nicole) – They use an online calendar the residents can access
  - Sequoia (Tammy) – Piloting Zendesk at the corporate level with hope to roll it out to the residents as a communication portal.
  - CWS (Shellie) – Implemented resident surveys through Ellis and implemented Renter's Voice. Pleased with how it is going, but they were not prepared for what they would learn from it and how it would affect business. Needed to have a plan in place for handling feedback
  - CWS (Shellie) - Dropped Lead2Lease - issues the properties had to deal with were overwhelming for the site teams Technology has pitfalls – corporate wants to reduce staff when implementing technology but that is not the reality
  - AMLI (Carol) - Using Facebook to try to eliminate resident newsletters, etc., but it has actually added more to their workload due to the learning curve, having to respond to interactions, and the frequency required for social media Interactions
  - Camden (Dawn) - Implemented online renewals. Residents can go in and do renewals themselves. They don't have to print new contracts, etc.
  - Waterton (Jennifer) – Implemented Lead2Lease
  - Windsor (Mindi) - using iContact to send out resident letters

❖ What was your roll out process for the various methods/initiatives?

- AMLI – Has been working on a proprietary program tied to the iPad for about a year and a half because they could not find a box product that suited them
- Camden – Uses Active Building as an internal social network for communities where residents and staff can post. They use it for notifications of shut-offs to eliminate notices on doors. Have 53% resident participation; ran contests to get residents involved
- Camden (Dawn) – credits RealPage with aiding in their success of integrating
- Gables (Rebecca) – IT rolls system changes to Trainer and trainer facilitates to staff. Having system trainers as part of their group helps to manage the overall process of system training, soft skills, etc.
- Greystar (Stephanie) – Online leasing, documentation management, Lead2Lease, online apps, etc. need to have a cross-functional rollout internally before delivering to onsite teams. Corporate and support teams must all understand the process and their role. The program vendor is a good assistance, but you cannot solely rely on them

❖ What were your successes and lessons learned?

- Lincoln (Sheri) – Just started online applications and online leasing. Went well as far as training and rollout, but getting prospects engaged was more of a challenge
- Camden (Patti) - They have learned that maintenance teams prefer more hands on, so they are shifting to Simutech. Having great success with that. It gives examples but they can create their own in the classroom. Just rolled this out two months ago and having first classes on it, but it has been very successful so far
- Lincoln (Nicole) – Staff can hardly get comfortable with technology because it's ever changing
- Windsor (Melanie) – Struggling to balance technology with old school vs. new. Some experienced agents are having a hard time going paperless, and having to type while on the phone can take away from being personal
- Greystar (Lucy) – The challenge is that being technology-focused is not always customer-service- focused. Brought up Disney and how basic their platform is but how focused they are on the customer
- CWS (Shellie) - Went completely paperless to free up time for associates to handle more resident issues; was good in theory except that some PMs were too close to situations to appropriately respond without bias. Have to keep in mind there will be challenges with every roll out
- AMLI (Carol) – Rollouts are a tough process to get to the point where you 'make life easier'. There are more tasks today than there used to be during a rollout, but Customer Service and resident needs don't decrease
- Fogelman (Pattie) – PMs are overwhelmed by implementation of too many programs at one time – they use YieldStar and Lead Tracking Solutions and are rolling out Property Solutions. PMs are not willing to let go and delegate responsibilities for programs to associates

❖ Chat / Texting - How are you preparing to support this medium of communication?
    a. How do you ensure to obtain the customer's name to enter as traffic?
    b. How might this impact fair housing?
    c. How might this impact staffing?
    d. What companies/vendors are being used to assist with texting?

- Camden - looking into text/chat but not ready yet
- CWS (Shellie) – signed contract with IRIO for text services. Texting is great for messages from management to residents for notices, but mostly younger crowd is receptive
- Fogelman (Pattie) – looking at Property Solutions for text options. Nadine Green spoke in Memphis on Fair Housing and said canned responses are best to avoid Fair Housing issues. They must answer specifically what they ask and nothing more
- Greystar (Stephanie) –Using Outlook/Google Voice to text. Do not want associates to use personal cell phones for texting/contact with prospects/residents
- Walton (Melissa) – texting prospects for information through IRIO
- Lyon – About to test through Level One ($35/month pulls chat dialogue in as email)

❖ Building Link/Concierge services

- Building Link allows you to filter content to certain resident groups if needed (i.e. 6th floor only, etc.)
- Windsor (Mindi) - using Building Link for packages and dry cleaning

❖ Tablet Leasing/iPads – changing the sales process/incorporating into the tour

- Property Solutions has an app that Lincoln is trying, but connectivity is a challenge
- Camden (Dawn) - Connectivity is the biggest issue
- Venterra uses Wi-Fi in office, 3g on tours with the iPad
- Gables developed an etiquette course for iPad use
- Greystar (Stephanie) – Couple of owners pushing for tablet-only leasing, but PC and iPad do not interact well
- AMLI (Carol) –Tested iPads but connectivity was an issue as well as software that did not work well with the iPad. Would still like to pursue if obstacles can be overcome
- Windsor (Pam) – Properties download documents daily from PC to iPad for offline use. Having to go back to office to add information to prospect's file
- Yardi has apps for iPad and Android for maintenance/work orders/move-in/move-out
- Use of iPad agreements
  - ➢ Greystar –General electronic communications and equipment policy covers iPad use
  - ➢ AMLI – Has agreement/policy for properties including where to keep them in the office

❖ What technology tools are being used for maintenance?

- Lincoln - Testing Yardi's mobile maintenance app but trying to decide who is going to provide the phone
- Greystar (Stephanie) – Electronic make readies and work orders are generated through RealPage. Challenge is service team buy-in because maintenance does not have dedicated computers to use and don't want to spend that much time in the office. Another issue is PMs are having difficult time releasing control and allowing maintenance staff to handle that piece
- General consensus is that utilizing technology for maintenance is too time-consuming

❖ Mobile Learning – delivery methods

- Articul8 allows publishing to an iPad
- Lyon – WebEx and Webcams, but inconsistently
- Mobile learning not being utilized for the most part

❖ Virtual classroom – avatars, video game based learning, pod casts, company YouTube channel, Skype, Twitter

- Camden - Used Life Size to set up several video conferencing locations, but they are expensive to set up and they require a lot of bandwidth
- CWS (Shellie) –Used LifeSize as well to set up video conferencing (60" monitor and cameras) and love it – can see what participants are doing during training. Travel savings are huge; maintenance and new hire no longer go to Austin for training; can offer more classes and have increased participation
- Windsor (Pam) – YouTube channel videos where maintenance records a Resident Move-in Orientation, also posted on Facebook and blog. Good response from residents
- Fogelman (Pattie) – Uses a private YouTube channel for associates, which includes speakers at an annual Managers Conference and "Fogelman Coffee Talk" (so on-site staff can get familiar with corporate staff and what they do)
- Fogelman - Gave video cameras out at annual conference and asked maintenance to submit 7-minute videos on how to fix something. Generated initial excitement from staff but has seen low response so far
- Fogelman – Uses Brainshark – software for putting audio to PowerPoint – not expensive (Similar to Articul8)
- Camden - Using "Ushorts" videos (like a YouTube Video) that are no longer than 10 minutes to teach the residents to fix some of their own problems. Residents access through their internal resident portal
- AMLI - Using Vimeo for employee videos (quick mini-tutorials) available on their intranet
- Mercy (Susan) – Uses Skype for training with Regional Managers, so you can have face to face contact as well as voice
- AMLI - Uses webcams but only have a certain number of people around the screen. Requires T1 bandwidth to avoid connectivity issues
- Windsor (Mindi) - has interviewed via webcam
- Greystar /Fogelman – Use WebEx and web cams
- Gables – 20 - 30 minutes is the max for keeping employees engaged via webcam
- Salesforce Chatter – to communicate internally (like a private Facebook and free)

❖ What programs are you using for centralized billing? What have been your challenges and successes?

- Camden – Has used an customizable, internal billing called "RUB" (Resident Utility Billing) for 15 years.
- Mercy/Greystar - Use Ops technology through RealPage.
- Walton –Uses Payscan
- CWS – Uses Timberline (antiquated; on-site does not like using but accounting does)

❖ What type of Self Service Systems (off network) have been put into place at the communities to help Prospects/Residents with submitting Service Requests, Applications, Online Leasing, etc.?

- Camden - Looking at having a computer at each sales office off network where residents could pay rent but would not be able to use it for personal email, etc.
- AMLI - Uses locked down kiosks called SMART Stations (UniGuest). Challenges with SMART Stations have been with people needing guarantors, corporate leases, etc. Company pays fee for application but resident pays fee for paying rent
- CWS – Uses remote leasing stations (all-in-one flat screen monitor with keyboard where resident can submit service requests and prospects can do the entire leasing process). They introduce the prospect to the leasing station as part of their closing sales presentation and lead them to start the process right then. 83% of rental payments are online company-wide
- Fogelman – Uses online submission through website for deposits (checks, credit card). Must market credit card payments well up front due to convenience fees
- Waterton – Uses Sure Deposit and offers online payment by check/ money order
- Lyon- Putting in "pet spa" in with tubs, dryers, etc.
- Gables – Using marketing kiosk at lease-ups that serves like a concierge with info on the area as well as floor plans and amenities

❖ What products are you using for online resident payments? Are you experiencing an increase? Are you experiencing any pushback or challenges with the convenience fees?

- Lincoln - Uses Property Solutions. Can charge convenience fees depending on the amount
- Camden - Does not charge a convenience fee
- AMLI - Uses RentPayment and charges a $25 convenience fee for ACH and credit cards
- Camden - Has eliminated rent drop boxes at all communities
- CWS - Rolled out early 2012; no extra fees for the application. Selling online rent payments to residents as a 'more secure' option, offering a small incentive to get them to sign up

❖ What new amenities are you providing related to technology?

- Camden – Extending Wi-Fi to all common areas
- Lincoln – Discussing having touch screens with workouts available
- AMLI – Switched from having a yoga instructor to TV screens with different workouts available for their yoga room

❖ Technology Takeaways:
- Corporate level should be involved and understand program
- Never promise technology will make life easier
- Cross-functional team rollouts help to make everyone aware of what is happening across the board
- Cannot leave training entirely to the vendor
- Leasing Idea: Produce an orientation video on how to use your apartment; present to new residents via flash drive

TOPIC 2: TRAINING

❖ What are you using for post training evaluations to determine on the job application?

- Mercy (Susan) – Has a checklist that goes out via email to the on-site person's supervisor outlining objectives from the course that should be in practice
- Lyon – Trainer visits and follows up. Leasing Directors go through "Train the Trainer" so they can help with that follow up and report follow up training needs. Quarterly in person sales trainings
- Lyon – "Take 20" webinars (20 minutes, with one hot topic per session; record and send out as needed).
- Salesforce Chatter – Used for tracking after training – following procession of training with traffic reports and numbers
- Camden – Internal tracking system with start information, what goals were set, when to follow up, see where they go – up or down, celebrate or schedule additional training. Using trainers who are all ex-maintenance staff for training maintenance
- Post – Uses pre- and post-tests and follows up a couple of weeks later with a conference call
- Windsor (Melanie) – Manager will sit down to discuss strengths and weaknesses then sets goals at 15-, 30-, 45- and 60-day marks. Piloted only at this point
- AMLI (Amber) – Uses a learning timeline and moved to EKP – Economic Knowledge Platform on Cornerstone. Employs a time limit to complete their training set up by themselves with their trainer

❖ How do you maintain consistent performance when battling turnover? Are there tricks to keeping short-staffed teams doing the basics while in search of new hires?

- Use floaters while in search of new hires
- Keep all Training on one Calendar so there are no overlaps. Assign someone to keep the master training schedule
- Administer everything through an LMS
- Use a project timeline
- Include Regional Managers in all training
- Managers should be talking with associates after classes and supporting new ideas
- Camden (Patti) – Mentor program helps with internal promotions. Looking to using Podcasts for specific topic discussions
- Concord (Nicole) – Doing smaller/shorter training but went back to face-to-face group training with follow up on-site. Added field trainer for supplemental training. Supervisors use training classes as conversation starters after training occurs
- Behringer Harvard (Amanda) – Uses a learning checklist. Holds "Chat with Training" with Managers and Assistant Managers – one hour weekly conference call. Post to LMS for reference as needed. Transitioning frequency from weekly to bi-weekly. All employees work every Wednesday and have a team meeting with Trainer
- CWS, AMLI, Windsor, Venterra – Agree it has to start with hiring the right person. Customer service skills, immersion in the culture, communication skills – all as important as sales skills

❖ How do you balance/manage training with the rollout of new initiatives? Making sure that it is efficient and effective for the end users.

- Post - Need to involve IT before rolling out a new initiative
- Need to build a culture of change management and involve everyone who will be touched by the new initiative
- Have to identify the leader of each project
- Everyone who is impacted should have input
- Have pilots and roll everything out in phases
- Understand what is good for one group is not always good for all groups
- Make sure an initiative is ready before it is pushed out even if you miss a deadline
- Don't roll out too much at once
- Lyon – Offer different platform options: blended with webinars/on-site follow up/LMS test.
- Reduce 8 hour courses to 4 hour courses or less and parcel out if needed
- Offer a library of recorded learning topics 45 minutes or less in length
- Camden – Conducts short one on one classes for specific topics as needed. Training on Demand is conducted at the property in need of specific training
- AMLI – Each trainer is assigned one initiative to work through and roll out
- Gables (Rebecca) – Transitioning from 'manual' to 'storytelling' style training

❖ Does training participation and completion factor into an employee's opportunities for career advancement?

- Concord – It is a requirement that everyone complete all trainings for advancement. They do not have compensation program based on training. That is handled in their offer letter. Everyone has a learning plan and they have different checklists for different positions
- Mercy - It is up to the individual to want to learn and want to succeed

❖ What percentage of RMs support and encourage training of their on-site teams?

- Mercy – 95%. The training starts at the top level setting the expectation
- Concord – 80%. Their RM's and DM's participate in the trainings
- Windsor – 100% if it works within their schedule; otherwise closer to 80%
- Venterra – Most support it if the schedule works out
- CWS – 100% except when there are new acquisitions and they are trying to staff it
- Greystar – 75%
- Lincoln – About 74% but it depends on the RVP
- Gables - Retraining all staff. Monthly luncheon for RM's with introduction to classes
- Concord – Showcase the full new training course to RM's before rollout. Ask for feedback on any changes; gives ownership

❖ What are companies doing to account for the different learning styles of Millennials vs. Boomers?

- Lincoln – Really looking to college grads and young people, and are going to have to change their delivery, how succinct they can make training and still be successful. They are studying the generations
- Gables – Just rebuilt all the leasing courses – 3 new sales workshops about 2 hours each, more to do with how you sell to different generations – completely different than what they have ever done. Getting great feedback. Don't have any more day long classes
- NAAEI – Has a national apartment leasing program online, separated into 8 different modules. Next day applying what they learned onsite. Getting a lot of great feedback
- Lyon –Creates a manual, offers a webinar, and builds from there. Quarterly quality checks lead to training opportunities
- AMLI – Have to offer all types of resources. Having to do communication skills training with younger generation
- Concord – Gives employees a choice in how they want to be trained (In-person/online)
- Concord (Karen) – Offers ½ day class on effective communication skills

❖ What is today's vision for a corporate university? For example, do companies use a true university classroom model or provide a website with classes?

- CWS - Has programs in place where they have a nomination program and people have to be accepted into a program. The community director and regional director have to agree the person is suitable for nomination. They also do a review of shop performance and HR file review to rule out any personnel issues. Employees can self-nominate to indicate interest in a certain path
- Camden – Utilizes a Camden U program with degree path
- Windsor - Advanced training has a reward system; no penalties. Have to apply for M.I.T. and be approved. Online classes through Grace Hill, webinars, in-person classes (marketing, networking, leadership) – about 18 months on average to complete
- Pennrose - "Career Ladders" - 12 ladders, each ladder has rungs you can climb independently, lots of practical application, have a mentor, and must be sponsored for admission. "Walk a day in the shoes" - have to walk in 10 different peoples shoes for one day as part of the broad spectrum of learning for management roles
- Trend to move from position description to expert description. If you have a specialty, you might go to several different properties to use your expertise. Greystar refers to them as 'Gurus', Pennrose as 'Experts'

❖ What type of accountability is in place for employees to complete training, and at what level – employee, manager, training department? What are the consequences if training is not completed?

- Greystar – Report cards for all RPM's are red/yellow/green with training for the region
- Gables – Holds regular meetings based on feedback; bonuses and services are impacted by scores. Ties career development goals into compensation at RM level
- Waterton – Accountability trickles down from regional to associates
- Post – Company leaders set expectation and roll out to properties. They are bonused on survey results, and this is tied to recognition programs. Everyone is aware of what number they are to achieve
- Pennrose – Using learning contracts for accountability as part of a quarterly development plan
- Greystar – Uses a post-training action plan
- Pennrose – Performance and action plans attached to employee record in HRIS

❖ How effective are webinars vs. classroom training? How do you measure effectiveness? What classes are best trained online vs. in the classroom?

- CWS – Uses video conferencing and tapes at a learning facility. Has various training facilities and flies in staff once a month for 65 sites for a two hour training meeting. Then has a monthly operations call via video conference
- CWS – Each new employee spends a week at the home office in Austin with the trainer who loads everything they go over or should have on a flash drive

❖ What are companies providing for maintenance training?

- Windsor (Melanie) – Uses video conferencing for the maintenance side
- Gables – Maintenance managers referred to as 'Co-manager'
- Include maintenance in retreat with PMs; generated lots of great ideas

❖ How is feedback gathered from employees that receive training? How are surveys administered? Within what timeframe is feedback requested?

- Gables – Uses their LMS (Success Factors) to administer an evaluation/questionnaire post- training. The trainee receives an auto-notification to complete the evaluation
- Windsor - Engaging the manager more in the learning process/Class Action Plan. Email it to the associate and manager ahead of time so they come prepared to class. Fill out what they learned from the class and how they will apply it. Check in at 2 weeks and at 30 days, the regional trainer schedules a conference call with the manager. Process is manual, but managers feel more prepared and find it helpful
- Concord went with Ultipro last year but is now with Grace Hill and phasing out Ultipro
- NAAEI – LeaseHawk is coming out with a new system (used to be Call Source) will be introduced next year. Can set email surveys to go out automatically
- Survey Monkey – Used by some trainers to send out post-training evaluations

❖ How are organizations partnering with internal departments to effectively deliver educational offerings by instructors who may be outside the Education Department? How is the content and delivery monitored?

- AMLI – All program training goes through trainer to schedule. COO must oversee and balance rollouts and training
- Behringer Harvard – CIO, Project Manager, and Trainers meet every Friday to review needs and schedule accordingly
- Venterra – Must have management buy-in. Top 25 initiatives must go through training and marketing first before they can be rolled out

❖ High level leadership programs - What are you providing to your senior team to continue their development?

- Gables did some coaching last year and trying to develop a leadership program
- Mercy is developing a leadership symposium. They are looking at a 2-day conference. They have METI, leadership foundations, emotional intelligence, 360's for VP's and up
- Greystar – Looking at SkillSoft for generic leadership. They are having trouble finding training in how to be a leader in property management. Having to rely on Subject Matter Experts.
- Venterra – Hosts a leadership conference every year to discuss goals for the year. Their COO and CEO always speak

❖ How do you effectively train when time and resources allocated to training is limited? With so many new initiatives, it seems like an expert is needed in each area. How are companies providing training support for all of the different products and services rolled out to the onsite teams?

- Camden - Has 300 mentors who are also trained to provide one on one training in sales and maintenance
- Use regional trainers by holding "Train the Trainer" classes
- For maintenance training, you can use vendors sometimes

❖ Training Takeaways:

- 'Chunked', customized, on demand training is better than 6-8 hour training courses
- Stay consistent with rollouts and schedule training accordingly to keep from overloading on-site staff
- Get Property Directors and Regionals on board and reinforce
- High level Leadership Classes to include topics such as:
  ➢ How to coach
  ➢ Work life balance
  ➢ How to have those difficult conversations
  ➢ Delegation that works

TOPIC 3: CUSTOMER SERVICE / CUSTOMER EXPERIENCE

❖ What specific customer service guidelines exist at your company?

- One company empowers their on-site staff to have small gift cards ($10, $20, $40) to resolve an issue. Anyone can and should use them. They are budgeted for Good Will
- Windsor – Managers can spend $500 and everyone else can spend $250
- Lincoln – Have customer service module in training. Just launched a "We Care" Program outlining all LPC services
- Camden – They have a brand promise and mission statement they have to adhere to. The Camden Experience - touching all senses; consistent across all communities
- CWS – Half-day session as part of new hire training– very conversational, comparing customer service in other industries and applying it to be able to deliver good customer service onsite
- Training the Culture and Brand should definitely be part of hiring process and on boarding process
- AMLI - Has a brand promise that sets expectations for customer service. Rewards for being able to promote and know the promise. Leadership must know it too. Different from mission statement. Brand promise is specific to customer service
- Sequoia –Each site team creates a custom service mission and sticks by it for the year. The trainers go to each site and roll it out
- Lyon – Starts at new hire training – Lyon Trust. Service Recovery and Steps of Service are basic training
- Gables – Engage/Connect/Inspire program with new hires but all associates attended when the program was rolled out Three day program: ½ day welcome class on Friday; Mon morning back for class; split into groups for lunch and then out shopping properties with the blank shop report. Back on property on Tues and then back to training on Wed morning for Connect portion. Back to property on Thurs and then Fri morning back for Inspire portion
- Concord – No longer have a full Customer Service class but include it into all training classes
- Greystar – Customer service philosophy on day one – values and pillars. All team members come to a half-day combined class (all levels of employees) that covers core values, breakout sessions. Groups role-play a difficult scenario to learn how to handle

❖ What types of outside resources or content are used?

- Lincoln (Sherri) - Uses Grace Hill
- Windsor (Mindi) – *The Power of Nice* - when someone is observed doing something nice (for a resident or co-worker), they get a "nice cube"
- *How Full Is Your Bucket* - Put marbles in people's buckets for recognition
- Sequoia – Ordered "S cards" cards online to give to co-workers for doing something nice, and at the end of the year, they can redeem them for gifts

❖ What workshops or seminars have you found beneficial?

- Windsor – New manager seminars for dealing with difficult people
- Sequoia –*Outside In* Using as the framework for customer service initiative
- CWS (Julie) – *It's Not What You Sell, It's What You Stand For: Why Every Extraordinary Business is Driven By Purpose*. They did a book group after the annual leadership meeting. It gives the group a common language and common reference point
- Greystar –Dale Carnegie; After Burner – still using structure in all meetings
- Gables –Brings in outside speakers at corporate level
- Waterton – Using After Burner at corporate level – do not carry modules forward
- Lyon (Sharon) – Eagles Point – geared toward team building and leadership
- Greystar – National RPM meeting at Disney World through Disney Training Institute. Great spokesperson talked about Customer Service for two hours and then teams were released into the parks and had to interview employees at all levels and customers to compare their experiences, what they loved, etc.

❖ What companies are capturing preferences of residents/prospects for the purpose of personalizing the customer's experience over the term of their lease? What methods are you using to capture and use this information? Are you utilizing or considering a private social network to do so?

- Windsor – It is informal. Not easy to track.
- Sequoia – Asked what resident events they would like to see
- Post –Brought in outside source to look at entire platform – website, resident interaction
- Lyon, Waterton, Post, Windsor, Gables, Greystar, Concord – Using surveys
- Concord – Setting expectations and adapting service to comments
- Text analytics
- Kingsley survey respondents select preferred method of communication which helps personalize the experience going forward

❖ What are your customers teaching you about your business?

- Gables – That companies needs to be more flexible
- Post – They want transparent, cutting edge, immediate answers
- Greystar – They want companies to be easy to do business with
- Gables – Customers are more critical today; they want more and more, and responsiveness is the key

❖ How are companies modifying their operation and capitalizing on this information to improve customer perception and customer experience?

- Post – Added additional amenities (Cyber Café) when reasonable and possible
- Waterton – Try to accommodate what they ask for within reason (i.e. stay open later)
- Lyon – Just started with Kingsley in August. Focus on areas of improvement as a team. Basic/foundation – some advanced training; recovery training
- Post – Kingsley bi-annual Resident Satisfaction survey and new move-ins. After biannual survey, train on feedback

❖ Is there a way to hold employees accountable for feedback shared on customer experience, given all the tools we now have available to understand customer experience?

- CWS – Uses Ellis surveys to reinforce information and create a stronger expectation to get it resolved. Customers are pleasantly surprised someone is reading and responding to their survey feedback
- Windsor –Every Friday mangers pull all comments from surveys and notate what action is going to be taken. Residents appreciate being acknowledged, even if you can't fix it
- Emily with Windsor – with Kingsley, there is a place to put notes in the system for everyone to note what action they took. They contact everyone, even if they don't ask for it
- "You own it"- when initial contact is made with you, you follow it through
- Mercy – Accountability for report of a bad customer experience: Fact gather, get back story, is it a one-off or is there a pattern? There is a conversation before action
- Real time surveys give you insight; can see patterns of issues and be able to address/respond quickly

❖ What are the main differences companies have observed with the in person customer experience and the online customer experience?   How are companies gaining consistency in the overall customer experience? Does our curriculum work with today's customer? What changes are you making to ensure your team is properly engaging with customers?

- Today's prospect is well-informed and the focus is to validate/respond more than basic sales process
- Same level of customer experience is expected, no matter the type of property (standard, affordable, etc.)
- CARES team- builds more ongoing engagement and fosters higher resident satisfaction. CWS- move out touch point can ruin the entire experience even if move-in and touch points during residency were all great
- One company is extending their referral program to non-residents to reward previous residents for recommending others
- AMLI – Sees correlation between age of staff and satisfaction scores on surveys (older=higher, younger=lower)
- Gables – Training on communication (created internally) included office staff and service team
- "Amazing Experiences"- teams, execs, share experiences they have had elsewhere and group discuss how to implement
- Windsor – Redoing Customer Service training to include a "concierge" services piece

❖ What are some best practices companies have successfully implemented to train on creating a great customer experience?

- Utilizing The Disney Institute, Dale Carnegie, Afterburner
- On boarding slowly to make sure that the most important things are covered
- Using real time surveys to build engagement between lease signing and 90 day renewal letter
- Concierge services are being used more

Shellie Albosta – CWS
Nicole Salmieri – Concord
Sherry Sandefur – Lincoln
Mindi Kissling - Windsor
Stephanie Puryear Helling – Greystar

Questions for Panel:

❖ Marketing Plans: Is the written marketing plan a thing of the past or state of the art? If companies are using marketing plans, are they fluid and adaptable? How are companies maintaining and keeping marketing plans organized without making it overwhelming? How are companies approaching marketing strategies at the community and regional levels? How are companies measuring the performance of their marketing programs?

- CWS – No longer doing 110 page plan. Plans are now 6-10 pages and can be understood and implemented onsite
- Concord - Only for lease-ups and conversions (affordable to standard); re-evaluate plans based on weekly analytics
- Greystar – Marketing plans are standardized at corporate level
- Lincoln – Get staff to participate in helping at the grass roots level; marketing plans are done at the regional level
- Concord – Approaches with collaboration and delves into who is responsible for what
- Greystar - Yardi and Google analytics help measure and review

❖ How does advertising fit into your marketing plan?

- Concord - Top 5 traffic resources are not necessarily paid advertising (WOM, company/community websites, Craigslist, rent.com); moving away from paid advertising
- CWS- G5 provides Callsource number for every ad source to allow for more valid data
- CWS- Craigslist works for the Carolinas market, but not in Austin< TX
- Many are calculating cost per lease on a monthly basis
- Identify markets that do well with different resources. Markets / results are not all the same

❖ How are you competing with locators on Craigslist in large markets that are dominated by locators (i.e., Houston, Dallas, Atlanta)? In what ways are you maintaining and/or gaining a competitive edge on Craig's list?

- Greystar - RentSentinel, Lead2Lease, helps maximize opportunities through Craigslist
- Concord – Uses RentSentinel to optimize when to post
- LPC – Property Solutions has integration with Craigslist

❖ What does the future of the leasing office look like to you in 2015? What methods are you using today to increase online capabilities for your renters and onsite teams? For example, what are you implementing with regard to online leasing, renewals, electronic signatures, electronic file storage, and iPads?

- Online leasing growing. More of an electronic world than now
- We have to become experts with tools and data
- Social atmosphere - conversation areas with tablet leasing; writing tables instead of desks and soft seating
- More sight unseen leases
- Teams have to be excited about this
- Paperless properties will be the standard
- Self service kiosks in offices
- New associates will not understand manual operations
- Training is more essential for technologies (onsite and at corporate level)

❖ What does the leasing process look like today and what does it look like in 2015? What are you doing to create an online experience that contains customer friendly language that is more engaging to the customer?

- Must make the online leasing process easier
- Use of feedback to develop marketing campaigns
- Greystar – Some paper processes did not transition well online, had to revamp but try to streamline and make easier after each wave of roll out, re-evaluate and tweak as needed
- Concord – Uses survey feedback to build SEO and site improvements, trying to align reputation with marketing
- CWS – Redesigning their website based on customer survey feedback

❖ What are companies doing to push down initiatives coming from independent training and marketing departments? How are these departments working together to ensure the messaging is consistent and concise? Who and how do you monitor the success of these joint efforts?

- Piggyback onto company training and then make it your own
- LPC – If using a third party for training, an LPC trainer sits in, then follows up with attendees post training; attendees complete survey goes to RM

TOPIC 4: SOCIAL MEDIA & REPUTATION MANAGEMENT

❖ How are you tracking Social Media leads? If you don't have traditional contact info (name/phone or email), does your lead tracking software accommodate those situations or what is the workaround?

- Lyon – Reporting on Google and other sites like Facebook and Twitter

❖ Reputation management – how are companies managing their online reputation? Given the explosion of ratings/review sites, do companies only respond to reviews on certain sites and/or certain types of reviews? Who is responsible for responding?

- Concord – Acknowledge it and take conversation offline. Determine how they escalate the post based on what the post says. They respond initially and let them know they are working on it
- Windsor (Amber) – Speak to person (if known poster) and then respond online so you can refer to a solution that has already been determined
- Lyon – JTurner does a reputation report quarterly; it's on our onus to develop action plan
- Camden – Has a national full time person who monitors and manages online reputation.
- Many use Google alerts
- RentBits for reputation management reporting

❖ What are your best practices for using social media?

- Pennrose – Uses college interns do their social media. Marketing department follows up on comments and/or posts by residents or prospects
- AMLI – One dedicated person at every site handles all social media. The person must be multifaceted, sales focused, customer service oriented, witty, and have good grammar skill.
- Camden – They use a nation social medial person, but they have a blogger in each city. Bloggers must apply and attend blogging class. Blog has to appeal to wide range of readership and must provide useful content. *Achieved 88,000 likes on their blogs last year.* Blogs are typically monthly and must be approved by national SM person. Find the passionate people and use them
- How to be proactive in getting positive feedback online:
  - ➢ Have staff encourage postings by residents
  - ➢ Call residents within 30 days of moving in and ask them to post.
  - ➢ When you get a resident referral, call and say thanks and ask them to review.
  - ➢ Encourage / Ask to post online testimonials
  - ➢ Put ratings buttons on your website
  - ➢ Greystar – PM talked to residents and got them to post positive reviews –went from 27% to 89% approval rating
- Offer formal training on social media and reputation management
- Greystar- Teach teams how to respond to online forums/posts
- Camden- Training on twitter
- Camden- SM is not advertising. It's not going to get you leases. It's about creating / shaping the customer experience
- CWS/Windsor- SM is going to ramp up your SEO
- Concord – Maintain a posting schedule

❖ What are companies doing to generate likes on their property FB pages?

- Campaigns to get likes
- Build /admin Facebook contests through ShortStack

❖ Ratings & Reviews – will they become the new ILS for Gen Y?

- Yes