Client Retention & Customer Service

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Customer Service Audit

Overview

This document will assist you in ascertaining how the quality and range of your current property management services compare with some of the industry's best.

The questions contained on the following pages have been compiled after extensive research of Australasian property management businesses of varying sizes and types.

The purpose of performing this audit on your property management business is to:

- See how well your service levels compare with industry leaders, and
- Be able to identify areas of potential improvement.

Take the test, and be totally honest with your business.

See how many "Yes" answers you come up with.

After each group of audit questions, we have provided some advice on how to turn any "No"s into "Yes"s.

Communication with Landlord Clients by the Agency

• Rent Statements

1. Do you provide them more frequently than monthly (if requested by the client)?	**Yes/No**
2. Are they checked for accuracy before going out?	**Yes/No**
3. Are they easy to understand?	**Yes/No**
4. Do you put personal comments on them?	**Yes/No**
5. Are they available by email?	**Yes/No**

How to turn any "No" answers into "Yes" answers

- Provided you have good quality property management software, it should not cause you much extra work to provide mid-monthly or even weekly rent statements to clients.
- You should perform a "trial" statement run the day before your "final" statement run. Each statement should be printed out on blank paper and checked by the property manager for any errors or omissions.
- If your rent statements are not easy for your clients to understand, change your property management software. Otherwise, you could be costing yourself business.
- In today's IT literate world, if you cannot provide a client with rent statements by email, you are behind the pack in customer service terms.

• Periodic Inspections

1. Are you willing to provide the maximum number permitted by law?	**Yes/No**
2. Are they highly detailed?	**Yes/No**
3. Are they provided with photographic images?	**Yes/No**
4. Do they contain professional recommendations?	**Yes/No**
5. Are they available by email?	**Yes/No**

How to turn any "No" answers into "Yes" answers

- You should always be prepared to provide the maximum number of periodic inspections permitted by law, it is only a matter of pricing this service so that it is profitable for you.
- Today's client expects you to provide a report that clearly details the condition of the property, room by room.
- To be better than the competition in the provision of periodic inspection reports, consider providing a set of digital images with the report. It is not too difficult to upload images from your digital camera into a file that could be sent to your client. Most clients are on email, so the costs of providing this service it not high.
- Do not just advise a client of the condition of the property without providing some professional advice on what should be done. After all, that's what you are paid for.
- Most clients are now on email, so why print out the report and post it to them? It is faster and cheaper to email the report.

• Ingoing/Outgoing Inspections

1. Is the client advised of the results of these inspections?	**Yes/No**
2. Are copies of the reports provided to client?	**Yes/No**

How to turn any "No" answers into "Yes" answers

- Many clients would like to know how the property has been left by the outgoing tenant. So you should tell them (unless they have previously instructed you not to).
- In many States of Australia it is a legal requirement for you to provide a copy of any document that you sign on behalf of another person. So, if you sign the report on behalf of the client, they should receive a copy.

• Repairs

1. Is the client advised about the repair when it happens?	**Yes/No**
2. Is an estimate of the cost provided to the client?	**Yes/No**
3. Is the client advised when the invoice comes in, confirming that the work has been correctly completed and that you will be deducting the cost from the rents currently held?	**Yes/No**

How to turn any "No" answers into "Yes" answers

- Unless the client instructs you otherwise, you should advise them when a repair is necessary. This can be done through a short, scripted phone call, fax or email.
- As a professional property manager, you should have (or develop) a working knowledge of basic building maintenance and the estimated cost of routine repairs.
- When you receive the invoice from the tradesperson, you should call the tenant to confirm that the work has been correctly completed. This will impress the tenant and also keep your tradespeople on their toes.

• Rent Payments

1. Do you put all tenants on either a 'direct debit' or 'direct credit' for rent payments?	**Yes/No**
2. Are all your tenants' rents payable at least fortnightly to reduce the number of transactions that need to be processed each year?	**Yes/No**
3. Are all rents on common due dates to streamline the rent arrears process?	**Yes/No**
4. Is there a documented step by step rent arrears process that the client knows about and everyone in the team adheres to?	**Yes/No**
5. Are all the legal rent recovery steps taken at the appropriate time?	**Yes/No**
6. Is the client advised before you commence terminating the tenancy?	**Yes/No**
7. Is the client advised when the arrears are brought up to date?	**Yes/No**

How to turn any "No" answers into "Yes" answers

- Removing the processing or cash and cheque rent payments in the agency will increase office efficiency and reduce insurance premiums. It is also a great customer service initiative for tenants to have the rent automatically paid to you from their bank accounts.
- There is no justification to take "weekly" rent payments anywhere in Australia today. Less transactions to process means more efficiency, lower bank fees and less chance of mistakes in processing.
- Common due dates for rent make rent arrears processes easier and for the client, rent statements that are easier to understand (especially for multiple property clients).
- Having a documented process means that there is consistency of service across the entire property management team. The client should know exactly how you operate. That usually means less phone calls and stress.
- You must take the appropriate legal steps at the earliest available opportunity. There is no excuse for non-action, regardless of the tenant's excuse.
- Unless the client instructs you otherwise, you should seek the client's instructions before terminating the tenancy.
- Do not wait for the client to receive their rent statement to find out whether the rent arrears have been paid. The client might be experiencing financial hardship because of the rent arrears and you should be easing that pain for them by advising them as soon as the rent arrears have been paid (either by phone call, fax or email).

• Leasing the Property

1. Are weekly marketing reports provided to the client?	**Yes/No**
2. Are copies of all advertisements provided to the client?	**Yes/No**
3. Is there a minimum of twice weekly phone call/fax/email to the client?	**Yes/No**
4. Is the client advised immediately an application has been received?	**Yes/No**
5. Is the client advised when the application has been checked?	**Yes/No**
6. Is the client advised immediately after the tenancy documentation has been signed	**Yes/No**

How to turn any "No" answers into "Yes" answers

- You are most vulnerable to losing a property from management while a property is vacant. During this vulnerable time, you should be pouring on the communication. The weekly marketing report could be a standard template that you fill in, then fax or email to the client.
- All advertisements for a client's property should be sent to the client, particularly if the client is paying for the advertisements.
- Clients should be contacted during the leasing process at least twice each week, even if you not have any good news for them. This regular contact can also serve to manage a client's rent expectations, where the rent may be overpriced.
- A client should be contacted as soon as you have received an Application for the property, even before you have checked it. Once again, the client may be experiencing financial hardship, so you should never hold back on any good news call to the client.
- Unless the client instructs otherwise, you should get the client's instructions on whether an Application should be approved or not.
- You should phone, fax or email he client as soon as you have signed up a new tenant for the property. This is in addition to any letting advice letter you send to the client.

• General

1. Have you got a property management newsletter?	**Yes/No**
2. If yes, is it available to clients by email?	**Yes/No**
3. Is client information on the way you operate available on your website?	**Yes/No**
4. Is useful information sent to clients with their rent statements (such as editorials, hot buys, finance information, etc.)?	**Yes/No**
5. Are clients surveyed at least annually?	**Yes/No**
6. Are gifts provided to new clients?	**Yes/No**
7. Do you hold 'meet the team' functions with clients?	**Yes/No**
8. Are you conducting focus groups with clients?	**Yes/No**
9. Do you have a documented set of customer service standards?	**Yes/No**
10. Do you provide a money back guarantee of service?	**Yes/No**
11. Do you send your clients Christmas cards?	**Yes/No**
12. Do you send your clients Anniversary cards?	**Yes/No**

How to turn any “No” answers into “Yes” answers

- Today’s property management business should have a newsletter, if it is going to compete in this marketplace.
- Sending your newsletter by email is a fast, cheap way of communicating with clients.
- The internet is fast becoming the primary delivery channel for services and information. Today, clients should be able to access information about the way you operate from your website 24/7.
- Once again, the more you communicate with the client the more loyal they are likely to be. Sending the clients useful information with their rent statements helps achieve that objective and also enables you to cross-sell your other services.
- Clients should be surveyed at least annually to assess how your service is being received by your clients. Often survey results give you valuable feedback on where things are going wrong or how service could be improved or expanded. Let clients criticise you, if they feel the need to. After all, it is better to cop a bit of criticism while they are still a client, rather than finding out after they have already decided to terminate your services.
- It is worthwhile showing gratitude to your new client for giving you their business by providing them with some sort of gift. It should be a gift that the client is likely to keep for a long period of time.
- ‘Meet the team’ functions are excellent for creating a feeling of ‘belonging’ for clients. It also provides you with an opportunity to introduce your clients to new or key team members that they do not know.
- Conducting 6 monthly or yearly focus group meetings with randomly selected small groups of landlords and tenants can provide you with excellent feedback on your current service level and advice on how you could improve or widen the scope of your service. If possible, the focus groups should be externally facilitated so that your landlords and tenants are more likely to “open up”. Also, they should be rewarded in some way for giving up their own time to attend.
- You should have a documented set of customer service standards that are provided to clients as a minimum benchmark of your service quality.
- If you have service standards, you should also have a money back guarantee if your service standards fall below the published levels.
- Once again, as part of the regular communication process, you should be sending clients Christmas and Anniversary cards.

Landlord Clients' Communication with the Agency

• Accessibility of Property Managers

1. Are you as accessible to the clients as they expect?	**Yes/No**
2. Is there another competent person they can communicate with when you are not available?	**Yes/No**
3. Is your voice mail message changed daily?	**Yes/No**
4. Are you actively encouraging clients to use email as the main form of communication?	**Yes/No**

How to turn any "No" answers into "Yes" answers

- If clients complain to you by saying things like "I can never seem to get a hold of you" or "You are never in the office", you need to address that by either:
  - educating your client by telling them that an essential part of effective property management is being out inspecting properties, visiting tenants, etc. and that if you were in the office all the time, then you would not be doing your job properly
  - having a routine that ensures that ensures phone calls, faxes and emails are returned quickly and efficiently
  - training another team member (maybe the front office manager), to handle routine enquiries and/or take high quality messages (getting ALL the information.
- Callers hate "standard" type voice mail messages that do not change from one day to the next. Your voice mail message should be recorded fresh every day.
- More and more clients are using email. Why not suggest to clients that the primary communication channel (for routine communication) be by email. Emails usually take a lot less time than phone calls, and they are easier to record on file.

• Response Times

1. Do you have benchmark standards of response times to mail, faxes, phone calls and emails?	**Yes/No**

How to turn any "No" answers into "Yes" answers

- These response times should form part of your customer service standards.

• Business Hours

1. Are you open longer than your competitors?	**Yes/No**

How to turn any "No" answers into "Yes" answers

- A unique selling point (USP) to be able to use with prospective clients who have vacant properties is to be open longer than your competitors, even if it is only one hour a day longer.

• Accelerating the Leasing Process

1.	Do you provide written property presentation recommendations to clients?	**Yes/No**
2.	Do you have highly detailed Listing Forms and Rental Lists?	**Yes/No**
3.	Do you provide detailed information for prospective tenants on your website?	**Yes/No**
4.	Do all rental listings on your website have images?	**Yes/No**
5.	Are your newspaper advertisements are better than your competitors?	**Yes/No**
6.	Do you provide Tenant 'Information' Packs to prospective tenants?	**Yes/No**
7.	Do you have a database of prospective tenants?	**Yes/No**
8.	Do you personally escort all prospective tenants through properties?	**Yes/No**
9.	Do you hold properties 'Open for Inspection'?	**Yes/No**
10.	Do you have a specialist leasing representative?	**Yes/No**
11.	Do all your team members showing properties know how to qualify prospective tenants, effectively demonstrate properties and close the deal?	**Yes/No**
12.	Do you provide a 1 business day turnaround of a tenancy application?	**Yes/No**

How to turn any "No" answers into "Yes" answers

- Don't assume that all landlord clients know how to present a property for rent (particularly if it is their first property investment). You should be able to provide the client with a set of property presentation tips.
- The more detailed your rental lists and listing forms are, the more information you can provide to prospective tenants. The more information you give to prospective tenants, the more chance they will want to rent from you.
- Once again, the internet is a great information dissemination tool. You should be able to provide comprehensive about renting to prospective tenants who visit your website.
- Tenants (and landlords) like to see photographs of rental properties. EVERY property on your website should have at least one photo. Do not treat clients differently by being too busy (or lazy) to take a photo of the client's property and getting up on the web.
- If you newspaper advertisements are better than the competition, then you ads are more likely to be acted upon by a prospective tenant, which means letting the property quicker.
- Tenants should be treated like important customers of the business. They should be provided with a comprehensive pack of helpful documents to assist them in their new tenancy with you.
- If you maintain a database of prospective tenants, then there is more chance of getting properties leased quicker by communicating the details of any new properties that you list for rent to the tenants on your database.
- You should avoid giving out keys to prospective tenants at all costs. This is a customer service business, and your client expects you to protect the security of their property.
- Holding 'Opens' is a very time effective way of demonstrating property, not to mention that it is more convenient for prospective tenants.
- Having a 'specialist' leasing representative is another potential USP, as most of your competitors are only showing properties on a part time basis (because they are property managers).
- Today's leasing professional should have "selling" skills to maximise the chances of success in leasing properties.
- Checking a tenancy application should take no more than one working day. If it is likely to take longer, keep the prospective tenant informed at all times.

Communication with Tenants

• Gifts/Information when moving in to the property

1. Do you provide help for the tenant such as advice regarding the connection of utilities, removalists, cleaners, mail re-direction, etc?	**Yes/No**
2. Do you provide gifts such as 'Change of Address' cards, hampers, etc?	**Yes/No**
3. Do your new tenants leave your office saying "That was the best real estate customer service experience we have ever had?"	**Yes/No**

How to turn any "No" answers into "Yes" answers

- Treat the tenant like royalty and they normally return it with loyalty.

• Extraordinary Communication

1. Do you call them to ensure they have happily settled in to the property?	**Yes/No**
2. Do you call them after repairs have been carried out to ensure the job was done satisfactorily?	**Yes/No**
3. Do give them a phone call/letter/thank you card after a periodic inspection to congratulate them on they way they are maintaining the property?	**Yes/No**
4. Do you provide the tenant with a copy of the periodic inspection report (so that they can show it to their next landlord/agent)?	**Yes/No**
5. Do you provide all outgoing tenants with a copy of their Tenant Ledger?	**Yes/No**
6. Do you provide a tenant newsletter?	**Yes/No**

How to turn any "No" answers into "Yes" answers

- Call the tenant a week after they have moved in to ensure that they have happily settled into the property. They will really appreciate the call because it is probably the first time any property manager has called them like this.
- Once again, the tenant will really appreciate a call from you after repairs have been carried out.
- If the tenant is looking after your client's property well, that makes your job easier and keeps your client more loyal to you. Why not thank them?
- If your tenant applies to rent a property from another landlord or agent, they will appreciate you giving them a copy of an inspection report showing how well they have looked after a rental property that they can then show to the landlord or agent to expedite the processing of their application. The same with a copy of their tenant ledger.
- Why not keep your tenants informed in the same way you keep your clients informed? After all, many tenants buy investment properties and you should be managing the properties for them.

- ## Customer Appreciation

1. Do you send your tenants Christmas cards?	**Yes/No**
2. Do you have functions/information nights for your tenants?	**Yes/No**
3. Are you conducting 'focus groups' with your tenants?	**Yes/No**
4. Are you surveying your tenants annually?	**Yes/No**

How to turn any "No" answers into "Yes" answers

- Tenants are paying customers. For the reasons previously stated, why don't you send them a Christmas card, provide functions for them and get their feedback on your service levels?

Customer Service Standards for Landlord Clients and Tenants

Overview

In the past, there have been perceptions by both landlords and tenants that the quality of service delivery in property management has been substandard or inconsistent.

The purpose in the development of the following service standards has been twofold:

1. To establish a set of minimum service delivery levels. In other words, everyone in the property management team agrees to, and is required to provide a level of service not less than the established Customer Service Standards.
2. To provide agencies that use and abide by these service standards, with an opportunity to attract more new business compared with agencies that have no established service standards.

In implementing these service standards, it is important for agencies to take note of the following.

1. The standards need to carefully examined and decisions made regarding:
    - the need for any customisation to the agency culture, size and structure
    - the willingness of all property management team members to take "ownership" of them and abide by them.
2. The standards relate to NSW residential tenancies legislation, so agencies in other states may need to customise them to their respective state laws.
3. A reference is made to the provision of a three month management fee free guarantee". Agency Principals should carefully consider whether they wish to make this sort of guarantee to landlord clients.

Property Management Customer Service Standards and Guarantee for Landlord Clients

Marketing your Property for Lease

- We will erect a ‘For Lease’ sign on your property within 2 working days of listing (if signs are permitted).
- We will place a listing for your property on all the real estate websites that we subscribe to and each listing will include at least 3 photographic images of the property.
- Your property will be accurately described and advertised in the newspapers (as mutually agreed between us).
- We will conduct an unlimited number of private viewings of your property and at least 1 ‘Open for Inspection’ each week until the property is leased (subject to access provided to us by any current occupant).
- All property viewings will be carried out by one of our representatives (we do not give out keys to prospective tenants).
- We will update you on the status of your available property at least twice each week and provide you with a weekly marketing report until such time as the property is leased.

Leasing your Property

- All information and references provided by tenancy applicants will be verified by us within 1 working day of receipt.
- All tenancy applicants will be screened on the national tenancy databases that we subscribe to.
- Unless you instruct otherwise, all potentially suitable tenancy applications will be referred to you for a decision.
- We will lease your property for the rental amount nominated in the Management Agency Agreement between us (or higher if the market justifies it) and the property will not be leased for a lower amount without your prior approval.
- Subject to the tenancy commencement date and the tenant’s availability, we will prepare the tenancy documentation within 2 working days of tenancy approval.

Rent Collection

- We have a zero tolerance rent arrears policy.
- We will follow up all rent payments in accordance with:
  - our fully documented arrears process, and
  - the requirements of the relevant legislation.
- Should your tenant get to 11 days in arrears, we will contact you to seek your instructions regarding possible termination of the tenancy.
- Should termination of the tenancy be necessary, we will keep you informed throughout the legal process.
- You will be advised within 1 working day of rent arrears having been paid by the tenant.

Rent Monies

- All monies received by us will be banked into your nominated bank account, or posted by cheque to you within 2 working days of our Rent Statement close off date.
- We can provide you with 2 monthly rent payments (15^{th} and 30^{th}) if required.

Repairs and Maintenance

- All non urgent repair requests from tenants will be attended to within 2 working days of receipt.
- We will not arrange any repairs to your property without your knowledge and approval (unless the repair is defined as “urgent” under the Residential Tenancies Act).
- We will attend to any “urgent” repair requests within 4 hours of receipt.
- All reasonable steps will be taken to obtain the best pricing for your repairs and maintenance.
- We will only use appropriately licensed and insured tradespeople for any repairs or maintenance work to your property.
- We will provide you with a copy of invoices for all work arranged on your behalf for the property.

Tenancy Agreement Renewals

- We will review the tenancy agreement for your property 90 days prior to it’s expiry.
- Unless you instruct otherwise, we will offer the tenant a renewal of tenancy agreement for the same period as the initial agreement at the same rent (or a higher rent if the market justifies it).
- You will be advised if the tenant does not want to renew their tenancy agreement.

Periodic Inspections

- We will carry out at least 1 periodic inspection of your property each year and provide with a detailed report each time.

Vacating

- On receipt of vacating notice, we will:
  - advise you by phone, fax or email
  - confirm the details in writing to both you and the tenant
  - list the property on our website & put the agreed advertising plan into effect within 1 working day
  - prepare all necessary vacating documentation
  - arrange access for viewings by prospective tenants.
- A pre-vacating inspection will be carried out to check for any potential problems with the property.
- After the tenant vacates the property:
  - process the tenant’s rental bond refund within 4 working days
  - if deductions from the rental bond are considered necessary, full details will be provided to both you and the tenant
  - complete all necessary documentation to finalise the rental bond within a further 2 working days.

Property Outgoings

- All agreed property outgoings will be paid on your behalf prior to the due date (subject to the availability of funds).

Rent Statements

- Your Rent Statement will be sent to you within 2 working days of our monthly close off date.
- Your Rent Statement will be personally checked by your Property Manager prior to being forwarded to you.
- We will provide you with a accurate Annual Income and Expenditure Statement within 30 days of the end of the Financial Year.

General Communication

- Our office hours are 8.00am – 6.00pm 7 days per week.
- We will respond to:
  - telephone messages within 4 hours
  - email within 24 hours
  - fax within 24 hours
  - mail within 48 hours
- We will promptly advise you of any pertinent matters affecting your property or the tenancy.

Complaints

- Tenant's complaints received in writing (i.e. fax, letter, email) will be acknowledged within 1 working day
- All complaints will be formally recorded and responded to within 2 working days.

Documentation

- We will provide all documentation in clear and concise English.
- We will ensure that all documentation is accurate and complete.
- All property condition reports will be comprehensively and accurately completed.
- Copies of all documents that we sign on your behalf as agent will be forwarded to you (unless you instruct otherwise).

Personal Information

- All personal information will be held in the strictest confidence and will not be released to a third party without written authorisation.
- All updates and corrections advised to us will be recorded in our system within 1 working day.

Professional Standards

- The highest standards of honesty, integrity and professional practice will be conducted in compliance with the Code of Conduct of the Real Estate Institute of Australia.

Guarantee

- If we fail to meet any of these standards the next 3 month's management of your property will be provided to you, free of charge.
- This Guarantee does not apply when:
  - We are requested to carry out non-standard duties.
  - Matters are outside our control. For example, a natural disaster or accident.

Customer Service Surveys

Once we understand the property management processes, the challenge becomes how we can move through these processes with our clients in a way that will most quickly and effectively achieve their goals. The key to this is good communication and a consultative technique. Good communication is not simply talking or giving information. It is an exchange of ideas or information and in customer service, this exchange always occurs in the following order:

1. Information from client
2. Information to client.

- Use proper telephone etiquette. Answer within 2 rings and with a smile. When necessary, ask the caller, **"May I place you on hold?"**
- Always attend to a caller's needs, before placing them on hold.
- Never put a caller through to voicemail, without asking their permission first.
- Escort clients rather than just pointing out directions to another area of the office.
- Smile – we are on stage. Always maintain positive eye contact. Use proper vocabulary with our clients. Use words like **– "Good morning", "Certainly",** and **"My Pleasure"**.
- Uncompromising levels of cleanliness are the responsibility of every team member.
- Any team member who receives a customer complaint **owns** the complaint.
- Use a warm and sincere greeting. Always use the customer's name if and when possible.
- Use warm and sincere farewell. Always use the customer's name if and when possible.
- Be knowledgeable of all other areas of the business to successfully and efficiently answer customer enquiries.
- Maintain a positive attitude
- Always identify yourself – give clients a name they can associate with
- Be prepared for incoming calls – have your material ready
- Try and use the caller's name where possible (and write it down, asking for correct spelling)
- Courtesy is contagious
- Ask questions
- Always close for an appointment, therefore getting the name and number
- Remember to listen.

You should clearly understand exactly what kind of information you need to get. This will usually involve deciphering the client's circumstances and their wants and needs.

The most efficient way to get this information is to ask questions. The skill involved is in knowing the right way to ask questions and the right questions to ask. Once you learn this you can accomplish two important objectives. Firstly, you will get the precise information you need. Secondly, you will put in place the important and critical foundation of the property management processes.

Customer Service Surveys are a great way to obtain this information:

- Existing Landlord Client Survey
- Existing Tenant Survey
- Exiting Landlord Client Survey
- Lost Prospective Client "What could we do better?" Survey
- New Landlord Client Survey
- New Tenant Survey
- Pre Vacating Tenant Survey
- Receptionist Survey
- Rental Enquiry Survey
- Vacating Tenant Survey

Existing Landlord Client Survey

Name:

Property:

Property Manager:

Date:

We are constantly tracking trends and determining ways to improve our services. We are interested to know how you have been looked after by our Property Management Team.

Our Performance

Question 1	**Why did you choose us to handle your leasing and management of your property?**			
	☐ Property Manager	☐ Sales Agent	☐ Previously dealt with agency	☐ Marketing/ Advertising
	☐ Overall reputation	☐ Referral	☐ Other	
Question 2	**How would you rate the information & advice provided to you by your property manager?**			
	☐ Poor	☐ Satisfactory	☐ Very Good	☐ Excellent
Question 3	**Are you confident that your Property Manager listened to and understood your needs and concerns?**			
	☐ Yes	☐ No		
	Comments:			
Question 4	**How would you rate the level of communication from us?**			
	☐ Poor	☐ Satisfactory	☐ Very Good	☐ Excellent
	Comments:			

Question 5	**Were you happy with the rent achieved for the property?**									
	☐ Yes ☐ No									
	If No, why not?									
	Comments:									
Question 6	**Do you know about the other services we offer?**									
	☐ Home Loans	☐ Investment Division	☐ Project Sales	☐ Commercial/ Industrial Sales and Leasing						
	Comments:									
Question 7	**Do you own any other investment properties not being managed by us?**									
	☐ Yes ☐ No									
	Would you be interested in our representative presenting you with a proposal for the management of your other properties?									
	☐ Yes	☐ No								
	Comments:									
Question 8	**Are there any additional services you would like us to provide to you?**									
	Comments:									
Question 9	**How would you rate our Property Management Dept's overall performance between 1 and 10? Circle your answer below.**									
	1	2	3	4	5	6	7	8	9	10
	Comments:									

Question10	**What 3 things could we do to improve our service to you?**
	1.
	2.
	3.
	Comments:

Would you like to receive our Bi-Monthly Newsletter by email? ☐ **Yes** ☐ **No**

Thank you for taking the time to complete our survey. We value your feedback and continually aim to improve our service. If you have any questions or requests, please don’t hesitate to contact our Property Management Department on (Phone Number) or (Email Address).

Secret Shopper Checklists

An important part of the service quality control process is a “secret shopper” program.

This program involves the use of people who are totally impartial and independent of the property management business and any of its clients and customers.

There are checklists for the following scenarios:

- Prospective Tenant
- Prospective Landlord Client
- Initial Walk In Enquiry
- Initial Telephone Enquiry
- Initial Email Enquiry

These checklists could be used by these impartial, independent people when dealing with your own property management team in these various scenarios.

Secret Shopper Checklist (Prospective Tenant)

Agency Representative's Name ____

Property ____

Date of Viewing ___________________________

Issues	Answers	Comments
1. Was he/she on time for the property viewing?	Yes/No	
2. Was he/she appropriately dressed?	Yes/No	
3. Did he/she provide you with a friendly greeting?	Yes/No	
4. Did he/she give you a comprehensive viewing of the property?	Yes/No	
5. Did he/she provide you with quality information about the property?	Yes/No	
6. Did he/she answer all your questions satisfactorily?	Yes/No	
7. What documents did he/she provide to you?		
8. If you did not appear to like this property, did he/she give you information about other properties?	Yes/No	
9. Did he/she ask for your name/contact details?	Yes/No	
10. Did he/she have business cards?	Yes/No	
11. Did he/she seem to have extensive knowledge of the property/area?	Yes/No	
12. Did he/she explain the application process to you?	Yes/No	
Post Viewing	Yes/No	
13. Did he/she give you a follow up courtesy call?	Yes/No	

Signature ________________________________ Date ________________________

Secret Shopper Checklist – Prospective Landlord Client

Agency Representative's Name ______________________________

Property ______________________________

Date of Viewing ______________________________

Issues	Answers	Comments
Pre Property Appraisal		
1. Was any documentation sent to you prior to your meeting? If so, what was sent to you and what was the time frame after your initial enquiry?	Yes/No	
2. How long did you have to wait to have your property appraised?		
Property Appraisal Appointment		
3. Was he/she on time for the property appraisal?	Yes/No	
4. Was he/she appropriately dressed?	Yes/No	
5. Did he/she provide you with a friendly greeting?	Yes/No	
6. Did he/she ask questions about the property and your reason for wanting the appraisal?	Yes/No	
7. Did he/she carry out a comprehensive viewing of the property?	Yes/No	
8. Did he/she make any recommendations regarding the property presentation?	Yes/No	

9. Did he/she answer all your questions satisfactorily?	Yes/No	
10. Did he/she discuss the Management Agency Agreement with you?	Yes/No	
11. Did he/she have a visual/documentary presentation to show you?	Yes/No	
12. Did he/she seem to have extensive knowledge of the property market/area?	Yes/No	
13. Did he/she explain the leasing & management process to you?	Yes/No	
Post Appraisal		
14. Did he/she give you a follow up courtesy call? How long after the appointment?	Yes/No	
15. What documents did he/she provide to you?		

Other Comments

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Signature ____________________ Date ____________________

Secret Shopper Checklist – Initial Walk-In Enquiry

Agency Representative's Name ____

Date of Contact ______________________________

Issues	Answers	Comments
1. How long did you wait before being greeted or acknowledged?		
2. Did he/she provide you with a friendly greeting?	Yes/No	
3. Did he/she ask for your name/contact details?	Yes/No	
4. Did he/she ask your reason for enquiry and who you would like to speak with?	Yes/No	
5. Did he/she answer all your questions satisfactorily?	Yes/No	
6. Did he/she seem to have general knowledge of your enquiry?	Yes/No	
7. Was he/she appropriately dressed?	Yes/No	
8. Did he/she use appropriate language and grammar?	Yes/No	

Other Comments

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Signature ______________________________ Date ______________________________

Secret Shopper Checklist – Initial Phone Enquiry

Agency Representative's Name ____

Date of Contact _________________________

Issues	Answers	Comments
1. How many rings before the phone was answered?		
2. What dialogue was used to answer the phone?		
3. Did he/she provide you with a friendly greeting?	Yes/No	
4. Did he/she ask for your name/contact details?	Yes/No	
5. Did he/she ask your reason for calling and who you would like to speak with?	Yes/No	
6. Did he/she answer all your questions satisfactorily?	Yes/No	
7. Did he/she seem to have general knowledge of your enquiry?	Yes/No	
8. Did he/she use appropriate language and grammar?	Yes/No	

Other Comments

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Signature __________________________ Date _________________________

Secret Shopper Checklist – Initial Email Enquiry

Email Address Enquiry Sent To ____

Staff Member's Name ____

Date of Contact ___________________________

Issues	Answers	Comments
1. How long did he/she take to respond to your email?		
2. Did he/she answer all your questions satisfactorily?	Yes/No	
3. Did he/she seem to have general knowledge of your enquiry?	Yes/No	
4. What documents did he/she offer to provide to you?	Yes/No	
5. Did he/she use appropriate language and grammar?	Yes/No	
5. Was an "Auto Signature" used, to sign off the email?	Yes/No	

Other Comments

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Signature ____________________________ Date ___________________________

Where to now?

Item	Who	When

Notes