Policy: The Guest Card

Persons Affected

All property personnel

Purpose

To effectively use your guest card as a leasing and documentation tool, and to understand the role of the guest card in sales, marketing, fair housing and follow up.

Policy

- Only the approved Richman Property Services, Inc. guest card from WB Mason is to be used at all communities.
- A guest card must be completed on every prospect that calls, e-mails or visits your community.
- Only one guest card will be used per prospect. All contacts such as telephone calls, internet leads and on-site visits will be documented on the same card.
- All guest cards should be entered into OneSite before the end of every day and noted as entered at the bottom of the guest card.
- The same guest card should be used during the telephone call through the on-site visit. This allows you to be more knowledgeable about your prospects needs by having all their information in one location.
- All prospects should be treated consistently and fairly in accordance with Fair Housing laws. Using the guest card will help guide you in attempting to obtain the same information from each prospect to ensure compliance.
- You must fill out the entire guest card. If a prospect is reluctant to give you a piece of information, enter “WNG” in this area, denoting that the prospect would not give the information.
- All phone and on-site prospects should be asked how they heard about your community to determine the marketing source. This information is vital in making decisions regarding marketing budgets.
- The “Qualifying Statement” should only be reviewed at the end of a telephone presentation, just before asking the prospect to set an appointment or at the end of a community tour, after returning back to the clubhouse.*
• Documentation of all prices and specials that were offered to the prospect should be listed on each guest card.

• Reasons for deviating from the standard tour, including amenities must be documented on the guest card.

• The guest card should be used in all follow-up efforts. This allows you to speak knowledgeably about the prospect’s previous contacts with you, their preferences and helps personalize your conversation.

• All follow-up activity should be recorded on the back of the guest card & transferred into the computer.

• Each guest card should be marked as qualified or un-qualified after the on-site visit, in accordance with the following guidelines:

To be a qualified prospect:

1. The income must presumably meet the income guidelines for your community.
2. They must be looking to move in within 90 days.
3. The household must not exceed the occupancy guidelines.
4. They presumably meet all other screening criteria, including credit, criminal history or pet policy.

If these areas are not met, the prospect should be considered un-qualified and indicated as such.

• Each office associate will have a Guest Card Binder where their active cards will be kept. This binder will have tabs by month to organize the cards for easy follow-up. (Refer to LSG.POL.002.1 - Guest Card Binder Set-up and System for further details.) This binder should be kept at each person’s desk, near the telephone so as they or any other office personnel have easy & quick access to it.

* The “Income Qualifying Guidelines” may not be applicable or reviewed in this manner under specific circumstances. Please follow written direction from Corporate Management for deviation from this procedure.

LSG.POL.002
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