

**FORM 5-7 Shopper's Report and Checklist**

*company logo, name, and address ]*

Property	Shopper	Agent
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Date	Time	Shopper's Profile: Sex: _____ Age: _____ Race: _____ Marital Status: _____ Family Size: _____ Employer: _____ Occupation: _____ Income: _____
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Indicate whether item was performed by agent. Provide explanations in spaces provided below. Unusual and unacceptable items should be noted with appropriate commentary.

	Yes	No
<b>TELEPHONE TECHNIQUE</b>		
1. Telephone answered promptly? Date: _____ Time: _____	<input type="checkbox"/>	<input type="checkbox"/>
2. Property identified ? _____	<input type="checkbox"/>	<input type="checkbox"/>
3. Employee identified? _____ Title: _____	<input type="checkbox"/>	<input type="checkbox"/>
4. Asked for your name? Name given: _____	<input type="checkbox"/>	<input type="checkbox"/>
5. Tried to qualify you? <input type="checkbox"/> Apartment size <input type="checkbox"/> Rent range <input type="checkbox"/> Family <input type="checkbox"/> Employment <sub>1</sub>	<input type="checkbox"/>	<input type="checkbox"/>
6. Questions answered effectively?	<input type="checkbox"/>	<input type="checkbox"/>
7. Encouraged to visit property?	<input type="checkbox"/>	<input type="checkbox"/>
8. Appointment made?	<input type="checkbox"/>	<input type="checkbox"/>
9. Asked for your telephone number? Number given: _____	<input type="checkbox"/>	<input type="checkbox"/>
10. Would you (as prospect profiled) visit this property?	<input type="checkbox"/>	<input type="checkbox"/>
<b>APPROACH AND NEED DETERMINATION</b>		
1. Identified self ? Name: _____ Title: _____	<input type="checkbox"/>	<input type="checkbox"/>
2. Welcomed you ?	<input type="checkbox"/>	<input type="checkbox"/>

(continued)

	Yes	No
3. Asked for your name? Name given: _____	<input type="checkbox"/>	<input type="checkbox"/>
4. Used your name effectively throughout meeting?	<input type="checkbox"/>	<input type="checkbox"/>
5. Asked you to complete guest card?	<input type="checkbox"/>	<input type="checkbox"/>
6. Asked when you need/want (circle one) to move?	<input type="checkbox"/>	<input type="checkbox"/>
7. Tried to qualify you? <input type="checkbox"/> Apartment size <input type="checkbox"/> Rent range <input type="checkbox"/> Family <input type="checkbox"/> Employment	<input type="checkbox"/>	<input type="checkbox"/>
8. Asked about length of time you've lived in the area?	<input type="checkbox"/>	<input type="checkbox"/>
9. Asked how long at current address?	<input type="checkbox"/>	<input type="checkbox"/>
10. Asked about length of time with current employer?	<input type="checkbox"/>	<input type="checkbox"/>
11. Asked spouse/co-applicant same questions? Responses/Comments: _____ _____	<input type="checkbox"/>	<input type="checkbox"/>
12. Asked about why you visited property? Reason: _____	<input type="checkbox"/>	<input type="checkbox"/>
13. Asked why you are moving? Reason: _____	<input type="checkbox"/>	<input type="checkbox"/>
14. Demonstrated good listening skills?	<input type="checkbox"/>	<input type="checkbox"/>
15. Seemed sincere?	<input type="checkbox"/>	<input type="checkbox"/>
16. Tried to identify need? Need: _____	<input type="checkbox"/>	<input type="checkbox"/>
<b>PRESENTATION</b>		
1. Received tour of property?	<input type="checkbox"/>	<input type="checkbox"/>
2. Shown recreational facilities? List: _____	<input type="checkbox"/>	<input type="checkbox"/>
3. Discussed amenities? List: _____	<input type="checkbox"/>	<input type="checkbox"/>
4. Visited model? Condition: _____	<input type="checkbox"/>	<input type="checkbox"/>
5. Shown vacant apartment(s)? Specify: _____	<input type="checkbox"/>	<input type="checkbox"/>
6. Apartment(s) shown appropriate for your needs? If no, explain: _____	<input type="checkbox"/>	<input type="checkbox"/>
7. Informed of number of vacant units? Number: _____	<input type="checkbox"/>	<input type="checkbox"/>
8. Presented with information on community? Significant items: _____	<input type="checkbox"/>	<input type="checkbox"/>

	Yes	No
9. Presented property services? Significant items: _____	<input type="checkbox"/>	<input type="checkbox"/>
10. Explained lease and rules? Weaknesses: _____	<input type="checkbox"/>	<input type="checkbox"/>
11. Presented features and benefits of apartment, property, and community throughout presentation? Most significant benefits: _____	<input type="checkbox"/>	<input type="checkbox"/>
12. Explained resident selection criteria?	<input type="checkbox"/>	<input type="checkbox"/>
13. Presented profile of current residents? Profile: _____	<input type="checkbox"/>	<input type="checkbox"/>
14. Effectively encouraged to participate in presentation? Explain: _____	<input type="checkbox"/>	<input type="checkbox"/>
15. Demonstrated good knowledge of above items?	<input type="checkbox"/>	<input type="checkbox"/>
16. Focused presentation on how apartment, property, and community fulfill your needs?	<input type="checkbox"/>	<input type="checkbox"/>
<b>OBTAINING COMMITMENT/OVERCOMING OBJECTIONS</b>		
1. Asked you to rent an apartment?	<input type="checkbox"/>	<input type="checkbox"/>
2. Asked you to fill out an application?	<input type="checkbox"/>	<input type="checkbox"/>
3. Asked for a deposit?	<input type="checkbox"/>	<input type="checkbox"/>
4. Made other attempts to close? Number of: _____ Examples: _____	<input type="checkbox"/>	<input type="checkbox"/>
5. Responded effectively to "just looking,,? Explain: _____	<input type="checkbox"/>	<input type="checkbox"/>
6. Set up appointment for second visit? Date: _____ Time: _____	<input type="checkbox"/>	<input type="checkbox"/>
7. Offered concessions? List: _____	<input type="checkbox"/>	<input type="checkbox"/>
8. Asked for your telephone number? Number given: _____	<input type="checkbox"/>	<input type="checkbox"/>
9. Gave business card/brochure (circle)?	<input type="checkbox"/>	<input type="checkbox"/>
10. Made follow-up? Date: _____ Time: _____	<input type="checkbox"/>	<input type="checkbox"/>
11. Thanked you sincerely for visiting?	<input type="checkbox"/>	<input type="checkbox"/>
12. Would you (as prospect profiled) rent at this property?	<input type="checkbox"/>	<input type="checkbox"/>
13. Would you (as prospect profiled) rent from this agent?	<input type="checkbox"/>	<input type="checkbox"/>

(continued)

Indicate your opinions by checking the appropriate columns: Rate items from 1 (poor) to 5 (excellent), with 3 being average. Check N if you have no basis for judgment or an item is not applicable. Space is provided for additional items or comments, including recommendations for improvement. Explain all items marked 1 and 2.

Item	1	2	3	4	5	N	Comments
<b>PERSONAL ATTRIBUTES</b>							
Appearance							
Attitude							
Personality							
Initiative							
Judgment							
Knowledge							
Cooperation							
Courtesy							
Sincerity							
Motivation							
Self-confidence							
<b>SUMMARY EVALUATION</b>							
Telephone technique							
Approach							
Need determination							
Presentation							
Obtaining commitment							
Overcoming objections							
Personal attributes							
Overall evaluation							

**RECOMMENDATIONS AND NOTES:**

Suited for present position

Additional training: \_\_\_\_\_

Transfer from leasing to \_\_\_\_\_

Consider discharge. Explain: \_\_\_\_\_

\_\_\_\_\_

Note: Attach property/apartment(s) inspection reports.

	By	Date
Prepared	_____	_____
Reviewed	_____	_____
Reviewed	_____	_____