# Checklist for Processing a New Prospective Resident

# Residents Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# Address of property \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# *This process starts from the moment a prospective resident calls into the office until they sign the lease.*

# Insert data in PRI (Prospective Resident Inquiry) from a phone call or internet lead

# Prequalify resident in first 120 seconds on your first call with resident

# Direct them to the website to fill out application online and upload all supporting documents on line

# Log funds on cash log and put in cash box for accounting

# From dashboard, you will process application

# Change status on dashboard to ***“In Process”***

# Submit to manager for approval electronically (email) and manager will contact you via email of their decision and status

# Change status on dashboard to ***“Waiting Approval”***

# Manager if approved will change status ***“To Approve“*** on dashboard, if not will request more information

# Contact resident: you need more information, denied or approved. If approve let them know you need the holding deposit within 24 hours. *(Normally this is first month’s rent)*

# If approved prepare holding deposit agreement for resident to sign **Note**: If resident is signing lease complete **Step 16 NOW.** In either case up load the appropriate document into the application evaluation file cabinet.

# Submit to manager to approve holding deposit or lease documents

# Have resident sign holding deposit agreement give them required documents to bring in before they get keys and sign the lease *(Copy of renter’s insurance, utilities turned on, security deposit)*

# Call owner advise that property rented, amount of rent, and date of move-in.

# Call or schedule in property inspection schedule to put up already rented sign

# Prepare lease agreement and all ancillary documents in New Leasing Packet and upload into application evaluation file cabinet

# Schedule move inspection for property inspector in their calendar

# E- mail manager for approval of lease agreement, etc.

# Prep for leasing signing and their resident celebration day:

# *\* Lease packet*

# *\* Balloons with your logo on them*

# *\* Review card for them to write out their experience with you*

# *\* Beach toiletry bag and its contents (See Beach bag for contents)*

# *\* 2 sets of keys – These should be new keys*

# *\* 2 garage remotes if applicable*

# *\* Mail box key*

# *\* FOBS for security gate, pool, etc*

# *\* Copy of HOA rules and regulations if any PDF*

# Day of signing put resident’s names up on TV, first names of kids

# On arrival greet them and put them in the conference room.

# Have them read through lease. Have reviews from other residents in 3 ring notebook on the table with the hopes them will flip through it

# Go through resident power point presentation (See Link for PPT presentation) and lease agreement and other documents at the same time. Have them sign each page electronically as you go through the power point presentation

# E-email them a copy of lease agreement and packet when your complete with presentation.

# Hand them your review pad or sheet for them to write a few words on their experience with your company to this point.

# Leave the room and go get the keys, remotes, FOBS, etc. and Beach bag – Allow at least 5-10 minutes to give them time to write about their experience with you

# Upon your return give them all the keys, garage remotes, fobs, etc., go over contents in beach toiletry bag

# Ask for the review they have given you and thank them

# Ask them if any of their friends or business associates need a property to rent

# Take a picture of them in front of your logo

# Ring the bell, cut balloons off TV if they have kids and give to the kids. Congratulate for being our Resident

# Load signed lease agreement into Application file cabinet

# Change status to rented

# Email to manager to sign and send back to accounting.

# Send a Send Out Card *(sendoutcards.com)* with 2 cookies as a Thank You gift.

# Put in your calendar for one week after they have move in and received their “SendOut Card”, to ensure the move-in was ok. If so, then send them a Review Request email. Include the review they wrote in in the office (see template) along with Yelp and Google links.