

# Training on Demand.



## COURSE CATALOG 2009

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## CallSource Distance Learning

CallSource provides the most comprehensive and affordable distance learning to the multifamily industry, along with the convenience of desktop access. We offer educational courses adaptable to individual needs, presented in interesting, memorable formats.

Our popular online, instructor-led and self-paced courses are developed by nationally-recognized multifamily training experts. CallSource distance learning programs provide the same high-quality, in-classroom learning.

Instructor-led distance learning is conducted in English, and available, by request, in Spanish. Sessions are conducted as a conference call within a virtual classroom. Each participant is given a toll-free phone number and access code to dial into the class. Each class features an expert presenter, lasts sixty minutes and delivers current, critical information in a live, personal and interactive format. In addition, the virtual classroom is accessed anywhere and is an excellent venue to introduce new technology.

Self-paced classes are available 24/7 in both English and Spanish, and include:

- A consistent message
- Simulations of software, equipment and situations
- Supervisor overview and individual transcript

Professionally-produced content is interactive and presented in an engaging, storytelling format.

Through CallSource distance learning

technologies, your employees can receive the full benefit of continuing education without expensive travel, time away from the community or scheduling hassles.

## Industry-Leading Education for Multifamily Professionals

How much are you spending to make your phone ring every day? Improve the telephone performance of your leasing professionals. Our wide range of programs are designed to empower your employees with the skills and knowledge they need to be successful:

- Conflict resolution
- Supervisory-level management
- Risk management
- Time management
- Legal compliance courses, including Fair Housing, Diversity, Prevention of Sexual Harassment

## Program Summary

According to the most recent industry report card from CallSource, leasing professionals:

- Know the name of only 62 percent of their callers.
- Don't build value when talking about price on 68 percent of calls.
- Know the needs and preferences of less than half their callers.
- Discuss the benefits of their communities and homes on 6 percent of calls.
- Set appointments with only 17 percent of qualified callers.

## TELEPHONE PERFORMANCE SUITE

Our courses deliver lasting success. With CallSource's Telephone Performance Analysis (TPA), calls are monitored and evaluated. If skill gaps are detected, the Telephone Performance Suite is recommended to bring the leasing professional to top performance:

### 1. Connecting with Your Callers

Each call is a potential sales opportunity. Within the first 30 seconds, you've established an indelible impression in the mind of your caller. Don't lose the chance to close the deal.

#### SYLLABUS

- How to prepare for and focus on every call.
- Why first impressions so important and how to make them memorable.
- Build rapport with every customer.
- Uncover your caller's needs and preferences.
- Enhance listening skills and increase sales opportunities.
- Uncover key elements in the qualifying process and getting the information you need to successfully serve every caller.

### 2. Selling the Benefits

This class teaches the emotion and thought processes that compel prospects to take action and land you the sale.

#### SYLLABUS

- Identify the information on the customer's mind.
- Unlock the mystery of "why people buy."
- Understand the art of persuasive language.
- How to talk about benefits instead of features on every call.

### 3. Setting the Appointment

You've made the connection and engaged the caller. This class will help you lock down the visit.

#### SYLLABUS

- Identify the five steps of selling that ensure an appointment is set with every qualified caller.
- Uncover three purchase motivations and get the appointment.
- Discover steps that turn an objection into an appointment.
- Set the appointment so the caller feels committed to it.
- Learn how to leave a memorable finish in the customer's mind.

## Welcome to Multifamily Housing

This class is designed for new employees with no prior experience in the multifamily industry.

### SYLLABUS

- Why are first impressions important?
- Make your first impression memorable.
- The five P's of the perfect property prescription.
- Why residents move.
- What your residents really want.

## Overcoming Leasing Pitfalls

Turn leasing opportunities into sales.

### SYLLABUS

- Identify two main ingredients that encourage customers to buy.
- Create and increase traffic.
- Identify objections and turn them into sales opportunities.
- Personalize closing strategies.

## The Art of Great Curb Appeal

You never get a second chance to make a good first impression.

### SYLLABUS

- What your customers see but don't tell you.
- Inspect what you expect: the essentials of great curb appeal.
- Establish a system to ensure great curb appeal every day.

## The Art of Internet Leasing

The Internet is the preferred channel for many prospective residents, and time is of the essence when you receive leads.

### SYLLABUS

- Respond to Internet inquiries from prospective residents.
- Utilize Internet resources that increase your business.
- Search the web for new resources including virtual tours, websites, and free resources.
- How property management experts use the Internet to market and lease properties.

## Marketing with Little or No Money

Learn tried and true ideas that can work within anyone's budget.

### SYLLABUS

- Successfully market on a shoestring budget.
- Marketing and advertising ideas you can afford.
- Marketing at the property, off-site and online.
- Why tracking the effectiveness of marketing sources is important.

## The Art of Resident Retention

Resident retention is an obsession with multifamily professionals. Minimize resident turnover while maximizing customer satisfaction with our proven techniques.

### SYLLABUS

- Uncover the true impact and cost of turnover on a property.
- Discover how residents view the renewal process and how to change their perception.
- Generational selling — learn what it is and how it can help in the renewal process.

## The Art of the Tour

Setting the appointment is just the beginning. How you conduct your on-site tour determines whether you close your prospect.

### SYLLABUS

- Why is the tour critical to your leasing success?
- What to include in the tour and why.
- Discover the key to sales and how to execute this knowledge.
- Appeal to a customer's senses during the tour.
- What role does each team member play in the tour?

## Surviving a Student Turn

Hear proven strategies to achieve optimum occupancy before school starts, as well as maintain high occupancy during the summer without losing your staff and your mind during the process. Can you answer yes to any of these questions?

### SYLLABUS

- Do you move most of your students out in Spring, only to have them return in the Fall?
- Are your vacancies too high during the summer?
- Are you still fighting vacancies by the time school starts?
- Do you have apartments that stay vacant for months?
- Do you have a hard time finding staff?
- Do you have a hard time keeping staff?
- Are vendors difficult to find?
- Does this happen every year?

## Orientation to the Results<sup>SM</sup> Platform by CallSource

Now more than ever, businesses need to know where leads originate, how those leads are handled, and what steps are needed to secure more closes. In short, entertaining vignettes, this orientation program demonstrates how Results are every-one's business.

### SYLLABUS

- **CallTrack<sup>®</sup> overview:** Optimize your use of the CallTrack system, including how to track and record calls, maximize the use of your company's caller database, act on incoming leads expeditiously, and build staff schedules to call volume needs.
- **LeadScore<sup>SM</sup> overview:** LeadScore reports are simple with these few important tips. Identify advertising performance and appointment-setting ratios at a glance, and maximize future campaigns with pinpoint accuracy.
- **Telephone Performance Analysis overview:** Learn to objectively evaluate the telephone skills of employees using this highly-accurate scoring system. Identify skill gaps, prescribe training and motivate your team by ranking their performance.

## Orientation to CallTrack by CallSource

Get on the fast track to results with the CallTrack system. Here you will learn the basics to getting started, and receive a full overview on CallTrack's key benefits.

### SYLLABUS

- Learn the fast track to logging in and get right to your master list

of tracking numbers.

- Access and listen to your archive of recorded calls.
- Learn where and how to enter your employee codes, and where to set up email notification.
- Learn to listen to the CallTrack message retrieval system.

### Learn to LeadScore<sup>SM</sup>

Explore LeadScore, a marketing and reporting tool by CallSource, that provides a true analysis of the effectiveness of your marketing and sales effort by qualifying sales calls as prospect or non-prospect.

#### SYLLABUS

- Learn to log into the LeadScore reporting dashboard.
- Identify the attributes that define a prospect call and how to qualify such calls.
- Build high-impact reports by learning to access prospect data by location and ad source.

### Orientation to Telephone Performance Analysis (TPA) by CallSource

Telephone Performance Analysis is a performance assessment tool that rates your employees' calls against a checklist of best phone skills practices. For managers, this course provides an overview accessing TPA reports; for individuals, TPA is a way to gauge their strengths and weaknesses and track improvement.

#### SYLLABUS

- Get the quick facts on logging in and where to find current and archived survey scores.
- Learn how to effectively navi-

gate categories and trending by management and location.

- Pull reports by individual employee.

## COMPLIANCE COURSES

### Exploring Diversity

Successful companies recognize and value the importance of diversity in the workplace and accept cultural differences. Explore the professional and personal benefits in understanding our increasingly diverse world and how it allows us to better serve our customers and our team.

#### SYLLABUS

- The definition of diversity.
- Diversity and culture: the role they play in business.
- Cultural competence: what is it?
- Establishing cultural competence in your organization and its effect.

### The Basics of Fair Housing

This class gives on-site, multi-site and home office employees basic working knowledge of Fair Housing laws.

#### SYLLABUS

- Federal and local Fair Housing laws and how they apply to our industry.
- Defining discrimination and avoiding illegally discriminating in the workplace.
- Best practices for Fair Housing compliance and how to avoid common pitfalls.

### Beyond the Basics — Disability Issues for Multihousing Professionals

Are you familiar with HUD and the

Department of Justice's new guidelines on accommodations and modification requests? This class provides the knowledge needed to confidently meet legal requirements.

#### SYLLABUS

- What significant changes were made regarding the evaluation of accommodation and modification requests?
- Best practices for compliance.
- Resources for additional information.

### Fair Housing and the Maintenance Team

This class gives maintenance and service employees a basic working knowledge of the Fair Housing laws.

#### SYLLABUS

- Federal and local Fair Housing laws and how they apply to our industry.
- Define discrimination and how to avoid it in the workplace.
- Best practices for Fair Housing compliance and how to avoid common Fair Housing pitfalls.

### Fair Housing: Playing Fair in Virginia

Campus CallSource includes the state-approved, two-hour Fair Housing class in a convenient self-paced format. This course satisfies the requirements of both the Fair Housing Board and the Real Estate Board of the Virginia Department of Professional and Occupational Regulation. In order to satisfy the Virginia requirements, participants must complete part 1 and 2 of the 120-minute class.

### Don't Let Mold Get Old

Mold effects everyone, but interaction with customers can create bigger issues than the mold itself. We discuss establishing uniform, written policies and procedures for managing and resolving mold complaints. We talk about effective customer communication to assure they are involved and satisfied with the manner in which such situations are handled.

#### SYLLABUS

- What is mold and why it significantly impacts our industry.
- Possible health effects of mold.
- How to identify and eliminate mold.
- Resident communication as a vital component in a mold response plan.

### PREVENTION OF SEXUAL HARASSMENT COURSES

### Prevention of Sexual Harassment

Employees get a basic working knowledge of law governing sexual harassment in the workplace, and how to avoid harassing behavior.

#### SYLLABUS

- Identify sexual harassment in the workplace.
- Employee and employer responsibilities.
- Sexual harassment prohibited practices.
- The complaint process.
- Action steps to guard against sexual harassment.

### Preventing Sexual Harassment for Supervisors

Creating and enforcing policies and procedures that eliminate harassment

in the workplace is an important responsibility of supervisors.

### SYLLABUS

- How to identify sexual harassment in the workplace.
- The role of the supervisor in preventing sexual harassment.
- Sexual harassment prohibited practices.
- Manage the complaint process to ensure compliance.
- Action steps to guard against sexual harassment.

## RISK MANAGEMENT COURSES

### Risk Management Level One — Level One — Protecting People

Mitigation of risk affects every aspect of a multifamily operation.

### SYLLABUS

- Interact safely in your community while protecting yourself, your co-workers, vendors, residents and their guests.
- Comply with OSHA standards including: blood-borne pathogens, material safety data sheets, personal protective equipment, lockout/tagout procedures and record-keeping standards.
- Work in your environment while being mindful of criminal threats. Gain insight on minimizing these risks.

### Risk Management Level Two — Protecting Your Property and Reputation

This course focuses on dealing with property risk.

### SYLLABUS

- Take the proper steps to keep

your community assets and reputation safe.

- Prepare an emergency plan that addresses potential threats to your community, such as fire, flood, criminal activity, etc.
- Develop advance responses to media inquiry in various emergency scenarios. This shields your asset from further damage against negative public exposure and diffuses potential litigation.

## CUSTOMER SERVICE COURSES

### Customer Service and the Office Team

Everyone is talking about customer service, yet surveys show customer dissatisfaction at an all-time high. Where is the disconnect? This class gives practical information and easy-to-use techniques sure to build customer satisfaction.

### SYLLABUS

- How customers evaluate service and how to satisfy them.
- What do customers want and how can we fulfill or exceed their expectations?
- Why communication plays a vital role in service and how to communicate more effectively.
- How to successfully communicate with a difficult customer.

### Customer Service and the Maintenance Team

While the maintenance team typically has the most contact with residents, they rarely receive customer service training. This class gives advice, examples and easy-to-

use techniques certain to increase rapport and customer satisfaction.

### SYLLABUS

- A day in the life of a service professional and how it impacts customer satisfaction.
- What customers really want.
- How to exceed expectations.
- Effectively communicate with your customers.
- Manage difficult situations while remaining polite and professional.

## LEADERSHIP SERIES COURSES

### Dealing with Difficult People, Supervisor Version

Understanding and communicating effectively with your employees and residents, regardless of their mood or circumstances, is essential to the success of multifamily supervisors.

#### SYLLABUS

- What makes a person difficult?
- The difference between difficult vs. upset people.
- Utilize two specific skills and become a master at managing difficult people.
- The three stages of conflict and how to make them work for you.
- Quick tips on how to handle predictable hassles.

### Preventative Hiring

Finding and keeping good employees is critical to a solvent operation.

#### SYLLABUS

- Incorporate recruiting into your and your staff's daily activities.

- Maximize employee, resident and vendor referrals.
- Create the perfect interviewing environment. Cultivate proper interviewing techniques within your team.
- Incorporate interview questions and techniques that uncover prospects' talents and weaknesses.

### Inspiring the Leader in You (Leadership 101)

Transitioning from manager to leader is not automatic, but characteristics inherent in a dynamic leader can be learned. Learn how to harness these fundamentals and get on the path to successful leadership.

#### SYLLABUS

- Define the role of a leader.
- Learn and implement the skills necessary to establish yourself as a leader.
- Identify the difference between transformational leadership and transactional management.

### Coaching for Development

Development coaching is a necessary skill for high-performance leaders, and mandatory for personal and professional growth. Integrate proven coaching techniques to elicit and reinforce results-oriented behaviors in your sales team.

#### SYLLABUS

- Define the difference between coaching for performance and coaching for development.
- Implement our 10-step model to establish a baseline for



effective coaching.

- Develop effective questions, responses and measurement tools for successful coaching.

## Orientation to Our University® Training System by CallSource

Our University is a private label learning platform serving up synchronous and asynchronous training programs. For managers, Our University is a way to set standards, provide guidance, and get results from their team. Sales and service

professionals use Our University to learn valuable skills, meet expectations and track their career growth. This course is a primer to get both groups started on the Our University platform.

### SYLLABUS

- **Sales and Service:** Receive clear and concise instruction on logging on to Our University, creating a profile, using the My Training component and how to take a course.
- **Level 1 Manager — Creating and scheduling online courses:** Learn how to log on as a Level 1 manager, as well as create, list, edit and schedule courses.
- **Level 2 Manager — Creating and managing instructor-led training:** Learn to add class locations, create instructor-led training courses, manage attendance and how to navigate attendance reporting.

### PEOPLE SKILL COURSES

#### Dealing with Difficult People

While some customers are not the easiest people to work with, learn how to communicate more effectively with them, regardless of their mood or circumstance. What makes a person difficult?

### SYLLABUS

- Understand the difference between difficult vs. upset people.
- Incorporate the skills necessary to become a master at managing difficult people.
- Learn the three stages of conflict and how to put them to work.
- Quick tips on how to handle predictable hassles.

## The Art of Delegation

What’s the difference between delegation and dumping? Many don’t know and their team pays the price by wasting time, energy, resources and not accomplishing their goals and objectives. Delegate effectively and get things done. Everybody will be happier and more productive. We provide the tools you need in this 60-minute class.

### SYLLABUS

- Two goals of delegation.
- Reasons people don’t delegate.
- Delegation vs. dumping.
- Identify the goals necessary to achieve success.
- Learn to be a great coach.

## Working Together through Generations — Exploring the Multi-Generational Workforce

Teaming with associates from different generations can pose challenges. This class provides tools to bridge the generation gap.

### SYLLABUS

- Recognize differences in work-style preferences.

- Four ways to effectively work with different generations.

## Managing your Maintenance Team

One of the most important aspects of resident retention is having a superior maintenance team.

### SYLLABUS

- Understanding the metrics of a superior maintenance operation and how to achieve maximum results with your team.
- Supervise your team to ensure resident satisfaction.
- Increase the successful interaction between office and maintenance staff.

## Improving Time Management Skills

Stress is created when we react to certain situations. It is the body’s way of preparing to meet a tough situation with heightened awareness. Work more efficiently and reduce your stress level by setting aside an hour to participate in this class. We share practical, proven techniques to manage your time, team, customers and life. Now that’s relief that is worth an hour.

### SYLLABUS

- Identify time-saving myths; gain better control of your day.
- Proven principles of time management and control.
- Manage time and become more efficient and effective.
- Use our techniques to get and stay organized.

	eLearning			On site
	SELF-PACED	INSTRUCTOR-LED	COMPANY EXCLUSIVE/INSTRUCTOR LED	COMPANY-EXCLUSIVE/INSTRUCTOR-LE
<b>Skills</b>				
Leasing	★	★	★	★
Customer service	★	★	★	★
Resident retention	★	★	★	★
Time management	★	★	★	★
<b>Compliance</b>				
Fair Housing				
English	★	★	★	★
Spanish	★		★	
Prevention of sexual harassment	★	★	★	★
Mold compliance	★	★	★	★

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CallSource has proven to be the most effective training tool we have come across in a very long time. I would recommend it to everyone in the property management business.

–J.E. Rock  
 Director  
 Dreyfuss Management LLC

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CallSource delivers Results<sup>SM</sup>, the first and only integrated marketing, sales, training and management system designed to track, measure, train and manage your team. Developed over 15 years and based on the review of millions of calls, this ground-breaking system goes beyond call tracking and reporting to

provide continuous monitoring of telephone performance. In addition, it provides targeted, individualized training and feedback to improve leasing and

retention results every month.

CallSource offers the industry’s best and most extensive eLearning courses, including self-paced and instructor-led. We have trained tens of thousands of multifamily professionals since 1995.



With carrier-class networks in Burbank and Chicago, CallSource tracks over 500,000 ads for over 10,000 companies across the U.S. and Canada.

**CALLSOURCE<sup>®</sup>**