

PERFORMANCE IMPROVEMENT REPORT

Performance Improvement Blueprint™

Prepared for The Residences at Willow Park · June 2026

OVERALL SCORE

79%



CONVERSION PROBABILITY

Moderate



ANNUAL LEASE VALUE AT RISK

\$24,540

12-month lease value

COMMUNITY INFORMATION

COMMUNITY

The Residences at Willow Park

PROPERTY MANAGER

Jessica Martinez

REGIONAL MANAGER

Sarah Thompson

MARKET

Dallas, TX — Class A Multifamily

EVALUATION PERIOD

June 9 – June 16, 2026

EVALUATION TEAM SNAPSHOT™



PHONE SHOP
Emily Carter

June 9, 2026 · 10:14 AM

78%



ONSITE SHOP
Michael Torres

June 12, 2026 · 2:05 PM

84%



FOLLOW-UP EVALUATION
Emily Carter

June 16, 2026 · 10:22 AM

50%

Executive Dashboard™

Provides leadership with a high-level overview of performance, opportunities, business impact, and conversion indicators.

TOP STRENGTHS

- Professional & Welcoming Presence
- Strong Product Knowledge
- Positive Tour Experience

TOP OPPORTUNITIES

- Discovery & Needs Assessment
- Apartment Recommendation
- Follow-Up Execution

CLIENT SPECIFIC SUCCESS MEASURES™

Marketing Source Captured	✗
Income Qualification Discussed	✓
Preferred Employer Program Mentioned	✓
Look & Lease Special Presented	✗

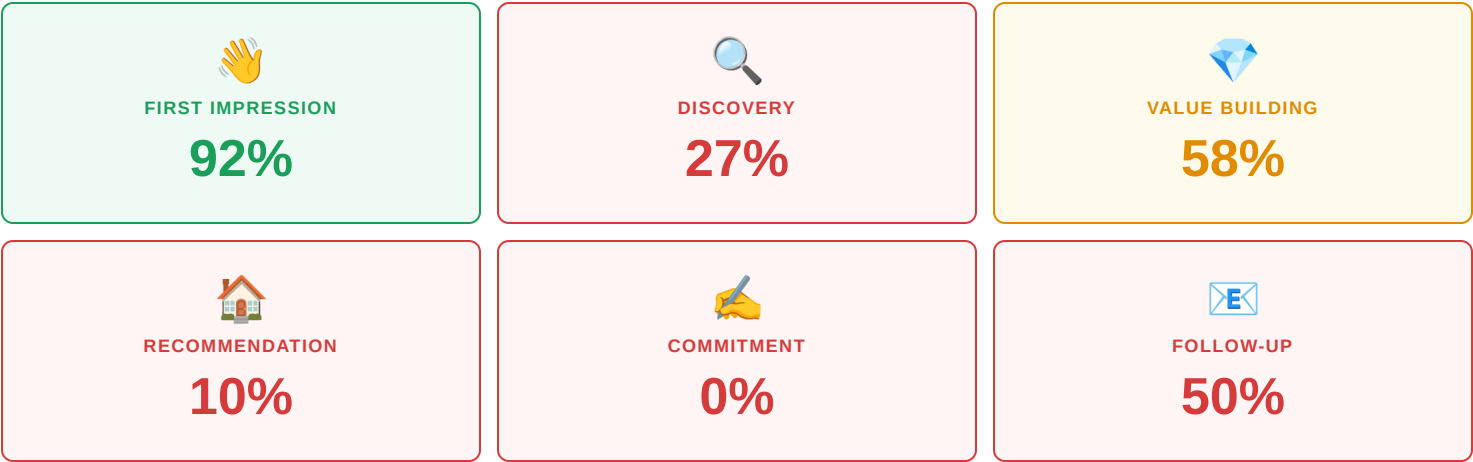
SHOPPER VERDICT

 **MAYBE**

The community showed well and the associate was personable, but the experience lacked the intentional guidance that converts a prospect into a resident. The shopper left without a recommendation, an application request, or a clear reason to act urgently — three elements essential for closing in today's market.

Leasing Decision Journey™

Maps the prospect's experience across each conversion stage, revealing where momentum was built — and where it was lost.



WHERE WAS THE PROSPECT LOST?

The prospect disengaged at the Discovery stage and never fully recovered. The associate failed to ask qualifying questions about lifestyle, timeline, or budget — meaning the value building and tour that followed were generic rather than targeted. Without understanding what the prospect needed, there was no foundation for a confident apartment recommendation or a closing conversation. The follow-up, while eventually attempted, arrived too late and without personalization to re-engage a prospect who had already moved on.

SECTION 03

Phone Shop Evaluation™

Emily Carter · June 9, 2026 · 10:14 AM · Duration: 6 min 42 sec · Score: 78%

CATEGORY SCORES

Greeting & First Impression		10/10
Discovery & Needs Assessment		4/15
Product Knowledge		10/10
Value Building		7/12
Apartment Recommendation		1/10
Closing & Commitment		0/15
Appointment Setting		0/10
Fair Housing Compliance		5/5

KEY OBSERVATIONS

- Greeted warmly and professionally; tone was inviting from the first moment of the call.
- Answered all product questions accurately — pricing, availability, and amenities were communicated with confidence.
- Did not ask about the prospect's move timeline, budget, or lifestyle preferences at any point during the call.
- Did not recommend a specific apartment or floor plan before ending the call.
- No appointment was set — prospect was invited to "come by anytime" rather than scheduling a specific time.
- Marketing source was not captured; opportunity to track lead attribution was missed.

CUSTOMER IMPACT

Limited discovery reduced the associate's ability to recommend the most appropriate apartment home and create a personalized leasing experience.

Onsite Shop Evaluation™

Michael Torres · June 12, 2026 · 2:05 PM – 2:52 PM · Duration: 47 min · Score: 84%

CATEGORY SCORES

Welcome & Curb Appeal		10/10
Office Presentation		9/10
Discovery & Needs Assessment		7/15
Tour Quality		11/12
Amenity Presentation		10/12
Apartment Recommendation		6/10
Closing & Commitment		3/15
Fair Housing Compliance		5/5

KEY OBSERVATIONS

- Tour was engaging, enthusiastic, and well-paced. The associate demonstrated genuine pride in the community throughout the visit.
- Amenities were highlighted naturally during the tour without feeling scripted or rushed.
- Office was clean, well-staged, and professionally presented upon arrival.
- A recommendation was made but lacked urgency — no reference to availability, pricing pressure, or a specific move-in timeline was introduced.
- Did not ask for the application or direct the prospect toward a next step at tour conclusion.
- Look & Lease special was not mentioned at any point during the visit or at departure.

CUSTOMER IMPACT

An engaging tour built genuine emotional connection, but the absence of a closing ask and a clear next step left the prospect without a reason to commit before leaving the community.

Follow-Up Evaluation™

Emily Carter · Evaluated June 16, 2026 · Score: 50% · Response received 96 hours post-visit

CATEGORY SCORES

Response Time		0/20
Personalization		4/20
Apartment Reference		10/20
Call to Action		12/20
Professionalism		20/20

RESPONSE TIMELINE

Onsite visit completed	Jun 12 2:52 PM	ON TIME
Expected follow-up window	Jun 12 by 5:00 PM	2-4 HRS
Follow-up email sent	Jun 16 10:22 AM	4 DAYS LATE
Phone follow-up attempted	— never	MISSING

KEY OBSERVATIONS

- Follow-up email sent 4 days after the tour. Industry best practice requires same-day or next-morning contact to remain competitive.
- No phone follow-up was ever attempted. Email alone significantly reduces re-engagement probability.
- The email did not reference the shopper's name, the specific floor plan toured, or any detail from the conversation — it read as a generic template response.
- Email was professional in tone, free of errors, and included a direct link to apply online.

Customer Experience Lens™

Analyzes the prospect experience through the lens of emotional response, friction points, and conversion barriers.

✓ WHAT WORKED

- Warm, professional first contact on phone and in person
- Beautiful community presentation and clean model
- Knowledgeable, enthusiastic associate throughout tour
- Amenities highlighted naturally and compellingly

⚠ WHAT CREATED FRICTION

- No qualifying questions asked about lifestyle or needs
- Tour felt informative but generic — not tailored to prospect
- Vague pricing conversation with no urgency established
- Departure had no clear next step direction

⊘ WHAT REDUCED CONVERSION

- No specific apartment was ever confidently recommended
- No application request was made at any point
- Follow-up arrived 4 days late with no personalization
- Look & Lease special never introduced

💡 WHAT WOULD INCREASE CONFIDENCE

- A targeted apartment recommendation tied to stated needs
- A direct ask: "Are you ready to apply today?"
- Same-day follow-up with a specific unit and pricing
- Reference to Look & Lease special at close of tour



I really liked the community and the person who showed me around was very nice. But when I left, I realized I wasn't sure which apartment I should apply for, or even if they wanted me to apply. I didn't hear back for four days — by then I had already signed somewhere else.

— Shopper Perspective™ · Emily Carter, Certified Mystery Shopper

Business Impact Analysis™

Quantifies the financial and operational cost of the performance gaps identified in this evaluation.

ANNUAL LEASE VALUE EVALUATED™

\$24,540

Represents the annual lease value associated with the apartment discussed during the evaluation.

3

LOST LEASE INDICATORS

96 hrs

FOLLOW-UP DELAY

0

APPLICATION REQUESTS MADE

LOST LEASE INDICATORS™

- No Apartment Recommendation — prospect left the community without a specific direction to act on
- No Application Request — neither the phone associate nor the onsite associate ever asked the prospect to apply
- Delayed Follow-Up — prospect had signed a lease elsewhere by the time contact was attempted 96 hours later
- Limited Discovery — value building was generic rather than needs-based, reducing emotional investment in the community

Manager Executive Summary™

Written directly for the Regional Manager and leadership team — a concise view of performance status and what to act on first.

79%

OVERALL SCORE

\$24,540

REVENUE AT RISK

3

COACHING PRIORITIES

LEADERSHIP PRIORITY FLAGS

- 1

Follow-Up Protocol — Immediate Action Required
A 96-hour response time is the single highest-risk behavior in this report. This is likely systemic — a protocol issue, not an individual one.

50%
- 2

Closing & Commitment — No Application Was Ever Requested
Neither the phone nor the onsite associate asked for the application at any point. This is the most direct conversion gap in the report.

0–20%
- 3

Discovery — Qualifying Questions Are Not Being Asked
The team builds rapport well but is not converting it into qualifying information that can guide the sale toward a personalized recommendation.

27%
- 4

First Impression & Product Knowledge — Protect These
Strong foundation. The community presents beautifully and the team is knowledgeable. Protect what is working as coaching begins.

92–100%

REGIONAL MANAGER NOTE

This community has the presentation and product to close. The gap is process, not personality. The leasing team is engaging and the community shows beautifully — but prospects are leaving without direction, and the follow-up window is being lost entirely. A focused 30-day effort on discovery, closing language, and same-day follow-up protocol should produce measurable results by the re-shop. This is a coachable team with strong upside.

Coaching & Development Plan™

A structured framework for addressing the top performance gaps through targeted skill development and measurable accountability.

PRIORITY 1

Discovery

OBSERVATION

Associate failed to ask qualifying questions about move timeline, budget, or lifestyle on both the phone shop and the onsite visit.

COACHING STRATEGY

Role-play the "5 Discovery Questions" framework within 48 hours. Use recorded calls for self-review alongside manager feedback.

SUCCESS MEASUREMENT

Score 12/15 or higher in Discovery on the next evaluation.

COURSE

[Rev Leasing: The Art of Discovery](#)

PRIORITY 2

Recommendation

OBSERVATION

No specific apartment was confidently recommended on the phone. Onsite recommendation lacked urgency and a connection to the prospect's needs.

COACHING STRATEGY

Practice the "Perfect Match" script — connecting discovered needs directly to a specific unit with pricing, availability, and a clear reason to act now.

SUCCESS MEASUREMENT

Score 8/10 or higher in Recommendation on the next evaluation.

COURSE

[Rev Leasing: Recommendation Mastery](#)

PRIORITY 3

Follow-Up

OBSERVATION

Follow-up email arrived 96 hours after the visit and contained no personalized reference to the prospect's stated needs or the unit toured.

COACHING STRATEGY

Implement a same-day follow-up template that references a specific unit and delivers a direct call-to-action within 2 hours of tour completion.

SUCCESS MEASUREMENT

Follow-up within 2 hours on the next evaluation; score 4/5 or higher.

COURSE

[Rev Leasing: Follow-Up That Converts](#)

30-Day Performance Improvement Blueprint™

A week-by-week action plan designed to drive measurable improvement within one full leasing cycle.

**WEEK
1****Foundation & Awareness**

Share full report with the leasing team in a structured review meeting. Discuss the Leasing Decision Journey™ as a team using the scoring breakdown. Begin the Rev Leasing Discovery course. Manager observes 3 live prospect interactions and provides real-time written feedback within 24 hours of each visit.

**WEEK
2****Skill Practice & Role Play**

Conduct 2 structured role-play sessions per associate — one focused on the "5 Discovery Questions," one on the "Perfect Match" recommendation. Manager reviews call recordings and provides written feedback. Implement same-day follow-up protocol with a templated but personalized email framework starting this week.

**WEEK
3****Live Application & Accountability**

Associate self-scores each prospect interaction using the Elevate scoring checklist. Manager spot-checks follow-up emails for personalization and timing — verify all responses sent within 2 hours. Track application conversion rate against prior 30-day baseline. Complete Recommendation Mastery module.

**WEEK
4****Measurement & Re-Shop Readiness**

Team completes self-assessment against all original scored criteria. Regional Manager conducts a 30-day progress review with the Property Manager. Community is now eligible for the 30-Day Follow-Up Evaluation. Recognize and celebrate documented improvements — wins matter as much as gaps.

Evidence & Validation Center™

Documented contact records and communication evidence supporting the findings in this report.

SHOP ACTIVITY LOG

CONTACT RECORD — JUNE 2026

●

Phone Shop — outbound call placed

Jun 9 10:14 AM

Duration: 6 min 42 sec · Shopper: Emily Carter

●

Appointment confirmation received

Jun 9 10:31 AM

Via text from office number · "See you Thursday!"

●

Onsite visit — arrival

Jun 12 2:05 PM

Shopper: Michael Torres · Duration: 47 min

●

Onsite visit — departed

Jun 12 2:52 PM

No follow-up initiated at departure

●

Expected same-day follow-up window

Jun 12 5:00 PM

No contact made — window missed entirely

●

Follow-up email received

Jun 16 10:22 AM

96 hours after visit — prospect had already leased elsewhere

PHONE SHOP
Jun 9, 2026

ONSITE VISIT
Jun 12, 2026

FOLLOW-UP
Jun 16 — Late

FOLLOW-UP EMAIL — CAPTURED EVIDENCE

Gmail — Emily Carter

From: Jessica Martinez <jmartinez@willowparkapts.com>

To: Emily Carter <ecarter@shopper.com>

Date: Mon, Jun 16, 2026 10:22 AM

Thank you for visiting The Residences at Willow Park!

Hi there,

Thank you so much for stopping by and touring our community! We loved meeting you and hope you enjoyed your visit.

We have a great selection of apartment homes available and would love to have you as a resident. Please don't hesitate to reach out if you have any questions...

[No mention of prospect's name, floor plan toured, or specific unit recommendation]

Received: Jun 16, 2026 10:22 AM · 96 hrs post-visit

Late — 4 days

ELEVATE MYSTERY SHOPPING

12 OF 13

Continued Performance Improvement™

Our commitment to your team's success extends beyond this evaluation.

Every Elevate engagement includes a follow-up evaluation at the 30-day mark — designed to measure progress, validate coaching effectiveness, and give leadership clear, documented evidence of improvement.

CONTINUED PERFORMANCE IMPROVEMENT

30-Day Follow-Up Evaluation

This community is eligible for a follow-up evaluation at the 30-day mark, included as part of the Elevate engagement, provided the Coaching & Development Plan has been initiated. The follow-up measures progress against the same criteria scored in this report — giving leadership a clear, documented view of improvement.

ELIGIBILITY

Within 30–45 days of original evaluation

RECOMMENDED TIMING

End of Week 4 — July 2026

HOW TO SCHEDULE

Email with your property name and preferred dates

WHAT WE RE-EVALUATE

All three shop types: Phone, Onsite, Follow-Up

SCHEDULE YOUR FOLLOW-UP EVALUATION

efranco@elevatemysteryshopping.com