

**Ten Best Practices for Relationship Management So You are Not Toast**  
**NARPM BROKER/OWNER CONFERENCE WORKSHOP**  
**Bob Preston, North County Property Group ([bob@ncpropertygroup.com](mailto:bob@ncpropertygroup.com))**

**COMPANY SELF-ASSESSMENT**

Instructions: As we progress through the workshop presentation today, for each statement below, rank your business on a scale of 1 to 5 where 1 is weak and 5 is strong. If you do not know or are not sure, that would indicate a lower score on the scale. Bob will prompt you when to score the respective questions.

<b>Questions:</b>	<b>Score</b>
1. We have a strong and diverse online presence comprised of a modern website, Google My Business page, various online directories, social media, and a blog or podcast.	
2. Our team posts regularly to our online presence with clear and targeted messaging, provides opportunity for online interaction through downloads, chat, ease of requesting quotes or a meeting.	
3. We are committed to a company-wide Customer Relationship Management (CRM) software, team members are trained, well versed, and consistently capture new property owner and tenant leads.	
4. Our CRM system is well organized and contains essential lead information, used by our team for regular follow up: contact's info, details of inquiry, email/text/call templates or scripts, lead stage tracking.	
5. New leads (new owner or tenant) are responded to in same day, preferably within one hour or first thing next morning if received after hours.	
6. All our staff can respond to leads, follows with a phone call (voice), are trained to provide a quality response, with a purposeful call to action and objective to move to the next stage.	
7. The business development or leasing team is always prepared for our appointments, consistently shows up on time, always in presentable attire, and will always make a good first impression.	
8. We will always end a customer appointment with identified next steps, then follow up with a thank you note, or email and completion of any action items promised.	
9. We are good as a company at keeping communication lines open with our customers and provide them with regular market, company, and legal updates.	
10. Our process and method for communicating with customers is consistent, documented, and utilizes tools in place for that purpose (CRM, property management software, email marketing software, etc.)	
11. We have systems in place for receiving regular feedback and reviews from customers, so we always know their overall level of satisfaction.	
12. Mechanisms for feedback and reviews are built into our company workflows such as email, work order completion, and MIMO. We are always aware when we receive feedback/review and always respond.	
13. Everyone at the company is engaged in positive customer interaction as well as showing appreciation, gratitude, and thankfulness for doing business with your company.	
14. We regularly or seasonally express our thanks to customers through a company supported gesture such as cards on special occasions, gifts/goodie bags during holidays, or donation to a special cause.	
15. We have a clear and visible company commitment and statement to corporate responsibility, sustainability, and support of solutions to social issues such as fair housing	
16. The company is committed to giving back through community service, acts of generosity, or charitable giving to organizations supporting populations in need.	
17. Everyone is committed to transparency and timely communication of items related to the property, whether it is good or bad news, in the spirit of keeping customers informed and updated.	
18. We have a policy to "do the right thing" when it comes to resolving conflict, working professionally through disputes, with a known escalation process to upper management when needed.	
19. Company management is committed to staying on top of industry trends, new solutions and technologies, and networking with others in the industry through associations and conferences.	
20. We embrace change and regularly explain new concepts to customers to educate and clarify trends.	

**TOTAL SCORE:** \_\_\_\_\_