

**Ten Best Practices for Relationship Management So You are Not Toast**  
**NARPM BROKER/OWNER CONFERENCE WORKSHOP**  
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**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:** \_\_\_\_\_