CRM Flex – The One Where We Get Our Flex On

We plan to have the participants work in pairs, keeping BlueMoon lease properties together and MRC lease properties together. We will encourage teams from different markets to sit together.

We plan to use a shared email account, so we can display CRM email activity on the main screen for all to see.

Ice Breaker: Call on member of the class have them introduce themselves and share one interesting fact about their favorite tech gadget or app. It could be a time-saving tool, a game-changer in their work, or something they find fascinating. Then that person will pick the next person to go.

I. CRM Queue
   a. UnReviewed Queue - Incoming Traffic - captures all electronic traffic
      i. Color meanings:
         1. Orange - does not have a matching record
         2. Blue - existing guest or resident
      ii. Icon on left - used for previewing voice message or email message
      iii. Action on open item = icons on the right
         1. Link to existing record - find person
         2. Find person for unidentified traffic and then Create new guest card
         3. Review Matches to help eliminate duplicates
         4. Trash Can –
            a. Should not be used for any prospect or resident.
            b. Provide reason for disposal
            c. Queue Filter (can show removed and reactivate if needed)
            d. Reports-CRM Reports - Invalid Leads Report
      iv. Filter options
         1. Show Removed filter option
         2. Group records filter option helps consolidate records from same person
      v. Email from ILS - auto create guest card (Displays as Web Request)
      vi. Emails - Other -> reply to email and gather more information before creating guest card; Replying from the Queue will not remove it from the queue

   b. Community Queue - shows what's due or past due
      i. Filter by self or unassigned – we'll use unassigned
      ii. Color meaning
         1. White - current
         2. Orange - past due
      iii. Appointments
         1. Edit and Save
         2. Complete by adding Show - Create activities for shows from appointments and not just doing the initial walk in
         3. Complete by Dismissing
      iv. Follow-ups

            1. 2-# added to descriptions for 2233 program
            2. Complete Follow-up
            3. select icon on left of record or look at activity log for resident
            4. quick complete from queue
        v. Prospects w/o active Follow-ups
            1. Cancel Guest and Dismiss future follow-ups and appointments
            2. Future Appt/Follow-up - Add in an activity with a future date will inactivate any pending and reset future follow-ups.
    c. PFUL impact –
        i. Going over the area where you update the PFUL top line.
        ii. Entry - basically, everything after the initial contact is a Follow-Up
        iii. Report - to reduce clutter, calls and emails are not picked up as a rule

New CRM Queue – Users have the option to use the New CRM Queue, or switch back to the Classic version. We will toggle to the New version and walk through the changes.

UnReviewed Queue:

Displays age in the queue, can hover over to see exact date and time

Hover over name to see the Quick Information

Buttons to assign lead if you don't have time at the moment to create the guest card

- Assigning to Agent directly from queue
    - Assigned to self -> goes into guest card and removes from queue
    - Assigned to other -> remains in queue
    - Send to Community - creates a copy of the guest card in Sister Property, adds a Referral record in queue

Activity icon provides quick access to all activity for the prospect/resident

Community Queue:

Follow Up button that allows you to Call/Email/Text directly from queue and autocompletes (This does not allow notes to be entered, so would not be used for PFUL entries)

Calendar widget: quick view that allows you to add/edit appointments w/o leaving the queue

Follow-Up widget: quick view that allows adding/editing of follow-ups

Additional Resources:

Help – Introduction to the New CRM Queue Short Tutorial

Help - Training - CRM Flex Part II: Manage your Queue Webinar

II. The Prospect perspective – class activity
    a. Applying
    b. Uploading paystubs
    c. Adding Bank Account –

d. When they click link to add Bank Account, they are redirected to Finicity
e. They then select there bank and login with their banking credentials
f. If their bank is not available, they have to go through this process 3 times and after the 3rd fail, the system will bring up the old method that allows them to enter the routing and account number and do the small $ amt test to verify
g. Screening returns approved
h. Verification of income

III. Application Submitted – Guest Card Workflow
   a. When you initially get a lease, you still go through the Leasing Workflow Steps that you did with Voyager. You go through the steps of checking MI dates, putting in your show, concessions, one time concessions, checking payment to match your fee schedule.

IV. Lease Documents – class activity
   a. MRC Lease - basic 4 steps
   b. BlueMoon Lease - 6 steps
   c. Information entered flows directly into lease document, any changes will require the lease to be regenerated
   d. Email sent to Future Resident for signing through Portal
   e. BlueMoon - Adding rentable items to residents and then resending a new contract
   f. BlueMoon One Off Addenda
   g. MRC Custom Lease – One off documents

V. Roommates – class activity
   a. Adding roommate to current resident
      i. Manually add roommate and then send Invite to Online Application
         1. What if they don't receive or can't find the email
      ii. Logging in and completing the application
   b. Promoting Roommates at the time of renewal – it's all about the timing
      i. Promote roommate immediately and enter a future Move Out date for one leaving
      ii. Enter Renewal

VI. Merging guests and grouping applicants

VII. Reports –
   a. PFUL now available through CRM
   b. CRM – Call
   c. CRM – Invalid Lead
   d. CRM – Reasons Did Not Rent
   e. CRM – Queue Management
   f. Screening Dashboard - Resident Screening Dashboard
   g. CRM – Queue Management – [We'll use a Yardi example of the report in class]
      See below for detail description of each field from the CRM Online help. Highlighted items are areas to focus on.

Queue Management Report column reference

Column	Description
Source Name	(Appears only when summarized by **Property/Ad Source**.) Basic advertising source associated with the piece of incoming traffic.
Total Units	(Appears only when summarized by **Property**.) Number of active units for the property or properties selected during the report filter period.
Active Agents	(Appears only when summarized by **Property**.) Number of active agents for the property or properties selected during the report filter period.
Total Inbound Traffic	Total amount of queue items (pieces of traffic) that appear in the **Unreviewed Queue** during the report filter period.
Unreviewed Count as of today	Total amount of queue items (pieces of traffic) that appear in the **Unreviewed Queue** as of today's date, regardless of the report filter period.
% Unreviewed Queue Aged Past (X) Days	Percentage of queue items (pieces of traffic) in the **Unreviewed Queue** as of today's date that are aged (X) days or more, regardless of the report filter period.
% Unreviewed Queue Dismissed	Percentage of queue items (pieces of traffic) that were dismissed in the **Unreviewed Queue**, regardless of the report filter period. ***[Total Dismissed ÷ Total Inbound Traffic = % Dismissed]***
Avg Hrs to Manual First Touch	Average time (in hours) from when a *guest card* is created to the first manual touch of that guest card during the report filter period.
Avg Days to Application	Average time (in days) from when a *guest card* is created to the *submit application* event during the report filter period. **NOTE** If the first contact event is an email, this is the average time in days from when the email lead first appeared in the **Unreviewed Queue** to the *submit application* event.
% Missed Follow-ups	Percentage of follow-ups missed during the report filter period. ***[Total Follow-ups Missed ÷ Total Follow Ups Due = % Missed Follow-ups]***
Manual Event Based Prospect Follow-Ups	Total number of manually scheduled follow-ups for all prospect event types. **NOTE** Does not include automatic follow-ups.

Column	Description
Contacts W/O Active Follow-ups Within (X) Months	Number of prospects without active follow-ups during the report filter period. **NOTE** Based on the amount (X) entered in the **ResCRMQueueLeadNoFollowUpMonth** optional parameter field on the **CRM Configuration** screen.
Contacts W/O Active Follow-ups Avg in Queue	Average time (in days) that prospects without active follow-ups have been in the CRM Queue, regardless of the report filter period.
All Contacts W/O Active Follow-ups	Number of all non-cancelled prospects without a scheduled future active follow-up, from the beginning of time until the date entered in the **To** field.