

DATE

TIME

COMMUNITY

TAKEN BY

CALL ☐ Inbound ☐ Callback

01 GREETING

FIRST 10 SECONDS

- ☐ Thanked + named the community
- ☐ Said my name
- ☐ Got their name early

“Thanks for calling [Community], this is [Name]! Who do I have the pleasure of talking with?”

FIRST NAME

LAST NAME

CALLING FOR

- ☐ Themselves ☐ Parent / family ☐ Group lead

02 NEEDS

GET THE INFO EARLY

- ☐ Asked how they heard
- ☐ Asked for the tour early
- ☐ Said why: email + text

“Out of curiosity, how’d you hear about us?”

HEARD VIA ☐ Friend / resident ☐ Instagram ☐ TikTok ☐ Google ☐ Website ☐ Drove by ☐ Other

BEST CELL BEST EMAIL

- ☐ OK to text ☐ Intro + pricing recap email

5 POINTS OF INFO

SCHOOL + MAJOR

HOMETOWN / LOCAL?

WHY THEY’RE MOVING

WHAT MATTERS MOST

MORNING OR NIGHT?

MOVE-IN TERM

LEASE LENGTH

- ROOMMATES ☐ Group ☐ Match me ☐ Solo

GROUP NAMES / HOW MANY

03 VIBE CHECK

MAKE THEM WANT TO VISIT

- ☐ Friendly + excited
- ☐ Showcased the location
- ☐ Tied it back to discovery

- AMENITIES THAT FIT THEM ☐ Pool ☐ Gym ☐ Study rooms ☐ Rooftop ☐ Game day ☐ Walk to campus
- ☐ Front desk / concierge ☐ Pets

HOW I TIED IT BACK TO THEIR 5 POINTS

04 VALUE

PRICE + THE WHY BEHIND IT

- ☐ Asked what they want first
- ☐ Price + features, never alone
- ☐ Asked how the price feels

FLOOR PLAN ☐ Studio ☐ 1 bed ☐ 2 bed ☐ 3 bed ☐ 4 bed ☐ 5 bed

MUST-HAVES: VIEWS, FLOOR, POOL OR CITY SIDE

PRICE QUOTED (PER PERSON)

INCLUDES

HOW IT FELT ☐ Feels good ☐ Too high ☐ Comparing places ☐ “Cheaper elsewhere”

THEIR BUDGET OTHER PLACES THEY’RE LOOKING

05 CLOSING

LOCK IN THE NEXT STEP

- ☐ Confirmed name, cell + email
- ☐ Real reason to act now
- ☐ Recapped + real thank-you

NEXT STEP ☐ Tour booked ☐ Application sent ☐ Waitlist explained ☐ Floor plans sent ☐ Call back

TOUR DATE + TIME

TOUR TYPE

FOLLOW-UP BY

NOTES • ANYTHING THEY SAID YOU’LL WANT TO REMEMBER ON THE TOUR

Every call ends with a next step.
Text them within the hour, and log the card today.

PHONE SCRIPT →

ITINERARY →