Multifamily NEXT

What's Now. What's NEXT. What Wins.

Pre-Workshop Skills Assessment

AI-Powered Journey Excellence: Elevating Multifamily Experience

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Assessment Overview

PURPOSE

Determine your current skill level to ensure optimal workshop experience and proper section placement

TIME REQUIRED

15-20 minutes

FORMAT

Three-part progressive assessment

SUBMISSION

Complete online 7 days before workshop

Part A:
Quick Competency Check

Complete this first - 5 minutes

INSTRUCTIONS

Select the best answer for each question

1. **What percentage of your prospect journey is currently documented?**
   - A) 0-25% - We track basic tours and leases
   - B) 26-50% - We have major touchpoints mapped
   - C) 51-75% - Most interactions are documented
   - D) 76-100% - Complete journey visibility
2. **How do you currently personalize resident communications?**
   - A) We use the same templates for everyone
   - B) We add names and unit numbers
   - C) We segment residents into different groups
   - D) We use behavior-based dynamic content

3. **What's your experience with AI tools in leasing/operations?**
   - A) Never used AI tools for work
   - B) Experimented with ChatGPT occasionally
   - C) Use AI tools weekly for specific tasks
   - D) AI is integrated into our daily workflows
4. **How quickly can you identify why a prospect didn't convert?**
   - A) We don't track this specifically
   - B) After monthly report review
   - C) Within a week using reports
   - D) Immediately through analytics dashboards
5. **What's your role in implementing new resident experience initiatives?**
   - A) I follow established procedures
   - B) I can suggest improvements
   - C) I implement changes at my property
   - D) I set standards for multiple properties
6. **How do you measure resident experience success?**
   - A) Occupancy rate only
   - B) Basic satisfaction surveys
   - C) Multiple KPIs tracked separately
   - D) Integrated scorecard with predictive metrics
7. **When a prospect ghosts after initial interest, you:**
   - A) Mark them as lost
   - B) Send one follow-up email
   - C) Have a standard re-engagement sequence
   - D) Use AI to predict best re-engagement strategy
8. **Your biggest challenge with technology adoption is:**
   - A) Understanding what's available
   - B) Getting approval and budget
   - C) Training team members
   - D) Integrating with existing systems
9. **How many resident touchpoints happen digitally at your property?**
   - A) Less than 25%
   - B) 25-50%
   - C) 51-75%
   - D) More than 75%

10. Your current tech stack includes:

- A) Basic property management software only
- B) PMS + email marketing
- C) PMS + CRM + multiple point solutions
- D) Integrated platform with AI capabilities

QUICK SCORE CALCULATION

- **Mostly A's**: Foundation Level → Complete full assessment
- **Mostly B's**: Acceleration Level → Complete full assessment
- **Mostly C's/D's**: Transformation Level → Skip to Part C

Part B:
Deep Dive Assessment

Complete based on your Quick Check results - 10 minutes

SECTION 1: JOURNEY MAPPING PROFICIENCY

Rate your organization's current state (1-5 scale):

Journey Documentation

- 1 = No formal journey documentation
- 2 = Basic linear journey map exists
- 3 = Detailed journey with all touchpoints mapped
- 4 = Journey includes emotional states and pain points
- 5 = Dynamic journey mapping with real-time updates

Your Rating: _____

Omnichannel Integration

- 1 = Single channel focus (in-person only)
- 2 = 2-3 channels tracked separately
- 3 = Most channels documented
- 4 = All channels integrated in journey view
- 5 = Seamless omnichannel journey orchestration

Your Rating: _____

Journey Analytics

- 1 = No journey-specific metrics
- 2 = Basic funnel metrics (conversion rates)
- 3 = Stage-by-stage analytics
- 4 = Predictive journey analytics
- 5 = AI-powered journey optimization

Your Rating: _____

Friction Point Resolution

- 1 = React to complaints only
- 2 = Annual satisfaction surveys
- 3 = Quarterly journey reviews
- 4 = Monthly optimization cycles
- 5 = Real-time friction detection and resolution

Your Rating: _____

SECTION 2: AI & AUTOMATION CAPABILITIES

Check all that you currently use:

AI Applications:

- ☐ AI chatbots for prospect inquiries
- ☐ Automated lead scoring
- ☐ Predictive maintenance scheduling
- ☐ Sentiment analysis of reviews
- ☐ AI-powered pricing optimization
- ☐ Virtual tour personalization
- ☐ Automated content generation
- ☐ Voice-enabled property search
- ☐ Predictive renewal modeling
- ☐ AI-assisted lease document processing

Automation Workflows:

- ☐ Basic email autoresponders
- ☐ Multi-step nurture sequences
- ☐ Behavior-triggered campaigns
- ☐ Cross-channel orchestration
- ☐ Conditional logic workflows
- ☐ Predictive send-time optimization

- ☐ Dynamic content assembly
- ☐ Automated task assignment
- ☐ Self-healing workflows
- ☐ Portfolio-wide automation

SECTION 3: PERSONALIZATION SOPHISTICATION

Select your current level for each area:

Communication Personalization:

- Level 0: One-size-fits-all communication
- Level 1: Name and unit details only
- Level 2: Segment-based (3-5 segments)
- Level 3: Behavioral personalization
- Level 4: Predictive personalization
- Level 5: Real-time adaptive content

Your Level: _____

Journey Personalization:

- Level 0: Same path for all prospects
- Level 1: Different paths for tours vs applications
- Level 2: Paths based on lead source
- Level 3: Paths based on prospect behavior
- Level 4: AI-optimized individual journeys
- Level 5: Predictive next-best-action

Your Level: _____

Experience Personalization:

- Level 0: Standard experience for all
- Level 1: VIP program for renewals
- Level 2: Tiered service levels
- Level 3: Preference-based customization
- Level 4: Predictive service delivery
- Level 5: Hyper-personalized experiences

Your Level: _____

SECTION 4: ANALYTICS & MEASUREMENT

Check all metrics you actively track:

Journey Metrics:

- ☐ Stage conversion rates
- ☐ Time between stages
- ☐ Drop-off points
- ☐ Channel attribution
- ☐ Path analysis
- ☐ Velocity metrics
- ☐ Cohort progression
- ☐ Predictive conversion scoring

Experience Metrics:

- ☐ Net Promoter Score (NPS)
- ☐ Customer Effort Score (CES)
- ☐ Customer Satisfaction (CSAT)
- ☐ Digital experience scoring
- ☐ Response time analytics
- ☐ First Contact Resolution
- ☐ Sentiment trending
- ☐ Experience ROI

Business Impact Metrics:

- ☐ Resident Lifetime Value (RLV)
- ☐ Acquisition cost by channel
- ☐ Retention impact of improvements
- ☐ Revenue per available unit
- ☐ Predictive churn indicators
- ☐ Experience-driven rent premiums
- ☐ Referral generation rates
- ☐ Operational efficiency gains

SECTION 5: ORGANIZATIONAL READINESS

Rate each factor (Yes/Partial/No):

Technology Infrastructure:

- Modern CRM/PMS in place: _____
- API integrations available: _____

- Cloud-based systems: _____
- Mobile-enabled platforms: _____
- Data warehouse exists: _____

Team Readiness:

- Digital literacy across team: _____
- Innovation time allocated: _____
- Change champions identified: _____
- Training budget available: _____
- Executive sponsorship: _____

Data Readiness:

- Clean, centralized data: _____
- 12+ months historical data: _____
- Real-time data access: _____
- Privacy protocols established: _____
- Data governance in place: _____

Part C:
Implementation Readiness

Everyone completes this section - 5 minutes

PRACTICAL APPLICATION SCENARIOS

Scenario 1: The Journey Challenge

Your property shows these patterns:

- 70% of prospects start online
- 45% use mobile exclusively
- 30% ghost after initial interest
- Average 7 touchpoints before touring

What would you do first?

- A) Increase marketing spend to get more leads
- B) Retrain leasing team on follow-up
- C) Map the digital journey to find friction points
- D) Implement AI-powered re-engagement

How would you measure success?

- A) Higher lead volume
- B) More tours scheduled
- C) Improved stage conversion rates
- D) Predictive quality scores

Scenario 2: The Personalization Opportunity

You have 100 prospects in your pipeline:

- 30 in awareness stage
- 40 in consideration stage
- 20 in decision stage
- 10 in application stage

Your personalization approach:

- A) Send the same message to all with mail merge
- B) Create 4 different messages by stage
- C) Build behavior-triggered dynamic campaigns
- D) Deploy AI to optimize individual messages

Your biggest challenge would be:

- A) Writing different content
- B) Setting up the technology
- C) Training the team
- D) Measuring the impact

Scenario 3: The AI Implementation

You've been given budget for AI tools with these constraints:

- $50,000 annual budget
- 5-person leasing team
- 200+ monthly leads
- 15% current conversion rate

What would you prioritize?

- A) AI chatbot for 24/7 response
- B) Predictive lead scoring
- C) Automated nurture campaigns
- D) All of the above - phased approach

Your success metric would be:

- A) Response time improvement
- B) Lead quality scores
- C) Conversion rate increase

- D) ROI within 6 months

YOUR CURRENT SITUATION

Property Portfolio: Select your primary type:

- ☐ Class A Luxury (premium experience focus)
- ☐ Class B Workforce (value and efficiency focus)
- ☐ Class C Affordable (retention focus)
- ☐ Student Housing (dual journey focus)
- ☐ Senior Living (family decision focus)
- ☐ Mixed Portfolio (scalability focus)

Number of Properties You Influence:

- ☐ 1 property
- ☐ 2-5 properties
- ☐ 6-15 properties
- ☐ 16-50 properties
- ☐ 50+ properties

Your Role:

- ☐ Leasing Professional
- ☐ Property Manager
- ☐ Regional Manager
- ☐ VP/Director Level
- ☐ C-Suite Executive
- ☐ Other: _____

YOUR TOP 5 CURRENT CHALLENGES

Select exactly 5:

Operational Challenges:

- ☐ Integrating multiple tech systems
- ☐ Data silos between departments
- ☐ Training team on new technology
- ☐ Measuring ROI of improvements
- ☐ Scaling beyond single property
- ☐ Maintaining personal touch

Resident Expectations:

- ☐ Instant response demands
- ☐ Self-service preferences
- ☐ Mobile-first experience needs
- ☐ Price transparency pressure
- ☐ Smart home expectations
- ☐ Community connection

Market Pressures:

- ☐ Rising acquisition costs
- ☐ Operational expense growth
- ☐ Occupancy maintenance
- ☐ Competition differentiation
- ☐ Talent retention
- ☐ Revenue optimization

IMPLEMENTATION RESOURCES

Budget Authority:

- ☐ < $10K discretionary
- ☐ $10-50K with approval
- ☐ $50-100K allocated
- ☐ $100K+ available
- ☐ Must build business case

Time Available:

- ☐ Add-on to full workload
- ☐ 5 hours/week
- ☐ 10 hours/week
- ☐ 20 hours/week
- ☐ Full-time focus

Team Support:

- ☐ Working alone
- ☐ 1-2 team members
- ☐ Full department
- ☐ Cross-functional team
- ☐ Enterprise resources

LEARNING GOALS

What do you want to achieve? (Select top 3)

- ☐ Master journey mapping fundamentals
- ☐ Identify and eliminate friction points
- ☐ Implement AI tools effectively
- ☐ Build predictive models
- ☐ Create portfolio-wide strategies
- ☐ Design automation workflows
- ☐ Calculate experience ROI
- ☐ Scale personalization
- ☐ Lead organizational change
- ☐ Develop team capabilities

When do you need to show results?

- ☐ Within 30 days
- ☐ Within 90 days
- ☐ Within 6 months
- ☐ Next fiscal year

What would make this workshop a success for you?

[Open text field - 2-3 sentences]

Scoring Guide

PART A: QUICK COMPETENCY CHECK

- Each A = 1 point
- Each B = 2 points
- Each C = 3 points
- Each D = 4 points
- Total: _____ out of 40

PART B: DEEP DIVE ASSESSMENT

- Section 1 (Journey): _____ out of 20
- Section 2 (AI/Automation): _____ out of 20 (2 points per item)
- Section 3 (Personalization): _____ out of 15
- Section 4 (Analytics): _____ out of 24 (1 point per metric)
- Section 5 (Readiness): _____ out of 15 (1 per Yes, 0.5 per Partial)
- **Total: _____ out of 94**

PART C: IMPLEMENTATION READINESS

- Each scenario: Most advanced answer = 3 points
- **Total: _____ out of 18**

GRAND TOTAL: _____ out of 152

Your Workshop Track

FOUNDATION TRACK (0-50 POINTS)

Perfect for Workshop Sections 1-3

You'll Master:

- Journey mapping from scratch
- Identifying friction points
- Basic AI tool implementation
- Essential automation setup
- Measurement fundamentals

Pre-Workshop Preparation:

- List all resident touchpoints
- Gather 3 months performance data
- Document current processes
- Identify quick wins

Your Day 1 Focus: Building strong foundations
Your Day 2 Focus: Practical implementation

ACCELERATION TRACK (51-100 POINTS)

Ideal for Workshop Sections 4-6

You'll Master:

- Advanced journey orchestration
- AI implementation strategies
- Scaled personalization
- Complex automation workflows
- Predictive analytics

Pre-Workshop Preparation:

- Bring current journey maps
- Analyze conversion funnels
- List automation priorities
- Prepare integration questions

Your Day 1 Focus: Optimization strategies
Your Day 2 Focus: Scaling excellence

TRANSFORMATION TRACK (101-152 POINTS)

Ready for Workshop Sections 7-8

You'll Master:

- Enterprise architecture
- Portfolio optimization
- Change leadership
- Innovation frameworks
- Strategic measurement

Pre-Workshop Preparation:

- Portfolio performance analysis
- Strategic initiative planning
- Team capability assessment
- ROI models ready

Your Day 1 Focus: Strategic frameworks
Your Day 2 Focus: Enterprise transformation

What to Bring to the Workshop

ALL PARTICIPANTS

- Laptop with Chrome browser
- Your completed assessment results
- Property performance data (3 months)
- Sample resident communications
- Current tech stack list
- Top 3 challenges documented
- Questions for instructors
- Open mind and growth mindset

ADDITIONAL BY TRACK

Foundation Track Also Bring:

- List of all touchpoints
- Recent feedback/complaints
- Basic process documentation

Acceleration Track Also Bring:

- Current journey maps
- Conversion funnel data
- Integration requirements

Transformation Track Also Bring:

- Portfolio comparisons
- Strategic plans
- Team training needs

Next Steps

1. **Submit Assessment:** Complete online form 7 days before workshop
2. **Receive Results:** Get your track assignment and prep guide
3. **Complete Pre-Work:** Based on your track level
4. **Join Prep Call:** Optional track-specific orientation

5. **Network Early:** Connect with track peers via workshop app
6. **Arrive Ready:** Bring materials and enthusiasm

Personalized Workshop Journey

Based on your assessment results, you'll receive:

- **Custom Learning Path**: Your priority sessions highlighted
- **Peer Connections**: Matched with similar-level participants
- **Resource Library**: Curated materials for your level
- **Implementation Template**: Ready-to-use frameworks
- **30-Day Action Plan**: Specific steps for your property
- **Support Network**: Ongoing community access

Competitive Benchmarking

Rate your position versus main competitors:

Area	Behind	Equal	Ahead	Leading
Journey Sophistication	☐	☐	☐	☐
Digital Experience	☐	☐	☐	☐
Personalization	☐	☐	☐	☐
Response Speed	☐	☐	☐	☐
Innovation Adoption	☐	☐	☐	☐

Your journey to multifamily excellence begins with understanding your current position. This workshop will elevate your capabilities, regardless of where you start.

Ready to transform your resident experience? Complete your assessment now!