RESIDENT SURVEYS

UNDERSTANDING RESIDENT RETENTION THROUGH THE CUSTOMER EXPERIENCE

Implementation Process and Guidelines

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Timeline Overview of Implementation Process

Pre Implementation

- Kick Off Meeting

Implementation

- Forms and Data
- System Set Up
- Pre Launch Meeting
- Benchmark Survey
- Dashboard Training
- Data Collection
- Review Meeting
- Training
- Go Live

Post Implementation

- 90 Day Business Review
- 180 Day Business Review
- 270 Day Business Review
- Annual Business Review

Key
Blue = Ellis is Responsible
Red = Client is Responsible
Blue & Red = Ellis & Client are Responsible

Resident Surveys Implementation Process and Guidelines
# Getting Started: Your Responsibilities

## Pre–Implementation (14 day period)
- Review & sign contracts
- Define & make business model decisions

## Implementation

### Phase I (first 7 days)
- Attend kick–off meeting
- Provide data for benchmark surveys
- Attend pre–launch meeting

### Phase II (30 day mark)
- Review benchmark survey
- Work with IT to finalize data queries
- Attend customer dashboard training
- Participate in review meeting

### Phase III (60 day mark)
- Pre–launch training for front–line employees

## Post Implementation
- Quarterly/Semi–annual business reviews
- Annual business review

**Resident Surveys Implementation Process and Guidelines**
Implementation Details: Pre-Implementation

Review & sign contracts
- Receive contract from Ellis
- Review, sign, and return contract

Define and make business model decisions
- Define expectations and align with organizational goals
- Review and agree to implementation timeline
- Assign implementation roles and review Ellis support network
- Discuss any business model questions
Implementation Details: Implementation Phase I

**Kick-off meeting**
- Review program methodology
- Review milestones
- Agree on deadlines and future meeting dates
- Review system set up information
- Discuss/plan training for employees

**Review forms & data**
- Compile participating properties
- Set up employee access
- Extract property data from PM system
- Start planning employee training

**Pre-launch meeting**
- Review progress
- Confirm date for benchmark survey
- Discuss issues/concerns
- Finalize training dates
- Review next steps & any questions

Resident Surveys Implementation Process and Guidelines
Implementation Details: Implementation Phase II

Benchmark survey distribution
- Ellis distributes benchmark survey to all participating properties
  *(sent three times with five days between each)*
- Collect data for two weeks

Customer dashboard training
- Demonstrate functionality of dashboard
- Facilitate train the trainer (TTT) classes

Participate in review meeting
- Review benchmark survey findings
- Address issues and concerns
- Coordinate front-line employee training
Pre-launch training for front-line employees
• Schedule 7–14 days before Go Live date
• Includes program methodology, using dashboards, and reporting features
Implementation Details: Post Implementation

Quarterly/Semi-annual business review
• Review and discuss results
• Highlight trends *(successes and opportunities)*
• Revisit organizational goals
• Discuss dashboards, training, technology, new business procedures, etc.

Annual business review
• Highlight trends *(successes and opportunities)*
• Discuss business strategy for upcoming year
• Re-establish organizational goals
• Review program metrics for continued alignment
• Discuss program improvements and any concerns