The Kingsley Portal is a web-based, real time survey tracking tool.

<table>
<thead>
<tr>
<th>Dashboard</th>
<th>Response Rates</th>
<th>Respondent List</th>
<th>Reporting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key scores and metrics in real time</td>
<td>Track response rates and count of undelivered surveys</td>
<td>See who has or has not responded</td>
<td>On demand, custom reports</td>
</tr>
<tr>
<td>Comparisons to the company portfolio and Kingsley Index</td>
<td>Monitor requests for contact</td>
<td>View survey transcripts</td>
<td>Analyze all questions, comments, and comparisons</td>
</tr>
</tbody>
</table>
Portal website URL is https://www.kingsleyportal.com
Initial login email provided by Kingsley Associates

1. Click the “Trouble logging in?” link to receive a password reset email.
Selecting a Program

You will land on your program’s Dashboard upon logging in to the Portal

1. Use the navigation bar at the top of the page to access the Dashboard, Response Rates, Respondents, or Reporting pages

2. Use the “Change Program” drop-down menu to access a different survey program
1. Filter data by property type and project

2. Key scores and metrics refresh every hour

3. Compare key ratings to company portfolio and Kingsley Index

4. Track scores over time

5. View key ratings by property or other groups

6. Review list of recent responses and transcripts

The Dashboard provides a high-level summary of survey metrics in real time.
The Response Rates page provides high-level survey response statistics

1. Filter data by property type and project
2. View table by property or other groupings
3. Review response rates, surveys sent, undelivered surveys, and requests for contact
4. Access complete list of requests for contact
5. Access the Respondents page directly for a single property or other group
6. Export data to Excel

### RESPONSE RATES

<table>
<thead>
<tr>
<th>Property</th>
<th>Response Rate</th>
<th>Responses</th>
<th>Surveys Sent</th>
<th>Undelivered Surveys</th>
<th>Requests for Contact</th>
<th>List</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sample Client - Office Portfolio (Annual)</td>
<td>67.8%</td>
<td>394</td>
<td>581</td>
<td>22</td>
<td></td>
<td></td>
</tr>
<tr>
<td>User - Office (Annual)</td>
<td>67.8%</td>
<td>394</td>
<td>581</td>
<td>22</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office Property 139</td>
<td>93.1%</td>
<td>27</td>
<td>29</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Office Property 157</td>
<td>80.0%</td>
<td>8</td>
<td>10</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Office Property 172</td>
<td>28.6%</td>
<td>2</td>
<td>7</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Office Property 174</td>
<td>100.0%</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Office Property 177</td>
<td>60.0%</td>
<td>15</td>
<td>25</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Office Property 184</td>
<td>50.0%</td>
<td>3</td>
<td>6</td>
<td>2</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Office Property 185</td>
<td>70.3%</td>
<td>17</td>
<td>24</td>
<td>1</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Office Property 186</td>
<td>75.0%</td>
<td>6</td>
<td>8</td>
<td>1</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Office Property 193</td>
<td>84.6%</td>
<td>11</td>
<td>13</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>
The Respondents page provides a full list of all potential survey respondents.

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filter</td>
<td>Filter by property type, project, status, or respondent information</td>
</tr>
<tr>
<td>Actions</td>
<td>Actions: verify, reinvite, remove, or close requests for contact</td>
</tr>
<tr>
<td>Edit invalid emails and respondent information</td>
<td>Edit invalid emails and respondent information</td>
</tr>
<tr>
<td>View respondent statuses and links to survey transcript</td>
<td>View respondent statuses and links to survey transcript</td>
</tr>
<tr>
<td>Verify respondent information</td>
<td>Verify respondent information</td>
</tr>
<tr>
<td>Add internal comment</td>
<td>Add internal comment</td>
</tr>
<tr>
<td>Track and close requests for contact</td>
<td>Track and close requests for contact</td>
</tr>
<tr>
<td>Highlight respondents with low satisfaction or renewal intent</td>
<td>Highlight respondents with low satisfaction or renewal intent</td>
</tr>
<tr>
<td>Add new respondents</td>
<td>Add new respondents</td>
</tr>
<tr>
<td>Export respondent list</td>
<td>Export respondent list</td>
</tr>
</tbody>
</table>

**Image Description:**
- The diagram shows a user interface for managing survey respondents.
- It includes options for filtering, verifying, reinviting, removing, and closing requests for contact.
- It also allows viewing respondent statuses and links to survey transcripts.
- Additional functionalities include highlighting respondents with low satisfaction or renewal intent, adding internal comments, tracking and closing contact requests, and exporting the respondent list.

**Table Example:**
- A table is shown with columns for Property Type, Survey Type, Project, Status, and other details, illustrating how respondents can be managed.
Respondents - Editing a Respondent

Edit respondent information and invalid email addresses

1. Click the pencil icon under “Edit”
2. In the pop-up window, edit respondent information as needed
3. Click “Save” to save changes

Updating a respondent email address while your survey is live automatically sends a new survey invitation to the updated email address
1. Select a property type for the new respondent

2. Click the “Add Respondent” button on the right side of the page

3. In the pop-up window, enter any respondent information, including a valid email address. Be sure to select the property to which the respondent belongs

4. Click “Save” to save changes

Adding a respondent while your survey is live automatically sends a new survey invitation to the respondent’s email address
Respondents - Closing Requests for Contact

Close out requests from respondents requesting contact from management

1. Contact requests are indicated by the phone icon. Click the column header to sort open (red) requests to the top. Click on the red phone icon to close an individual request.

2. In the pop-up window, check the box to indicate you have followed up with the respondent.

3. Enter a comment.

4. Click “Save.” Once a request is closed, the red phone icon will change to a green phone icon.
Respondents - Additional Actions

Apply actions to individual respondents or groups of respondents. Verify, remove, reinvite, or mark as contacted.

1. Select the desired respondents. Clicking the check box at the top of the column will select all respondents on the page.

2. Select the “Actions” drop-down menu to resend an invitation or mark as contacted.

3. Select “Submit” to apply actions to all selected respondents.
The Reporting page offers dynamic reports, refreshed daily.

1. Select report type, property type, project, level, and level value using the filters.
2. Switch comparisons to prior performance, company portfolio, or Kingsley Index.
4. Measure overall performance by category.
5. View top positive and negative differences in scores.
6. Export the report to Excel.
**Reporting - Question Details**

The Question Details report shows every non-comment question on the survey.

1. Select report type, property type, project, level, and level value using the filters
2. Display scores as averages or % 4s and 5s
3. Switch comparisons to prior performance, company portfolio, or Kingsley Index
4. Filter by type of question
5. Click “View” for time trend and detailed breakdowns of question
6. Export a list of responses to each question to Excel
7. Export report to Excel

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**REPORTING**

**TENTANT EXPERIENCE STUDY - SAMPLE 2020 PROJECT**

**Select a Report Type**
- Report Summary
- Question Details
- Comments
- Rankings
- Transcripts
- Full POF Reports

**Select Filters**
- Property Type: Office
- Survey Type: Overall
- Time Interval: Project: 2020
- Level: Level Value:

**View list data by: Compare Against:**
- Average
- Kingsley Index™
- All

<table>
<thead>
<tr>
<th>Question Name</th>
<th>Average Type</th>
<th>Total Count</th>
<th>Score</th>
<th>Kingsley Index™</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Questions</td>
<td>Categorical</td>
<td>45</td>
<td>4.53</td>
<td>4.31</td>
<td>0.22</td>
</tr>
<tr>
<td>Property Satisfaction</td>
<td>Categorical</td>
<td>45</td>
<td>4.53</td>
<td>4.31</td>
<td>0.22</td>
</tr>
<tr>
<td>Property Responsibility</td>
<td>Categorical</td>
<td>45</td>
<td>4.53</td>
<td>4.31</td>
<td>0.22</td>
</tr>
<tr>
<td>Value for Money Pd</td>
<td>Categorical</td>
<td>45</td>
<td>4.53</td>
<td>4.31</td>
<td>0.22</td>
</tr>
</tbody>
</table>

**Export Responses**

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Click “View” on the Question Details for additional time trend and breakdowns

For rating questions, view detailed trends and breakdowns of scores

1. View data as average scores or distributions
2. Track key comparisons and time trend
3. Display data by property or other breakdowns
4. Export report to Excel
For categorical or multiple response questions, view distributions of answer options rather than scores.

1. Filter data by breakdown or answer option
2. Track key comparisons and time trend
3. Export report to Excel

Click “View” on the Question Details for additional time trend and breakdowns.
The Comments report shows every comment question on the survey.

1. Select report type, property type, project, level, and level value using the filters.
2. View all comment questions by category.
3. Click “Cloud” to view common themes across all comments.
4. Click “View” to view responses and search comments.
5. Export all comments to Excel.
Click “Cloud” on the Comments report to view common themes across responses

1. Filter the cloud based on responses to a key rating question

2. The size of each word depends on the number of times that word was mentioned. Larger words were mentioned more times by respondents than smaller words

Only comments with more than 20 responses will have a word cloud generated
Click “View” on the Comments report to view and search responses

1. Filter responses by property or other breakdown
2. Search comments for key words or phrases
3. Sort by property, respondent, date, or response to related survey question
4. Export report to Excel
The Rankings report shows scores by property and other breakdowns.

1. Select report type, property type, project, level, and level value using the filters.
2. Select breakdown, question, comparison, and data type.
3. Scores and comparisons can be sorted by any column.
4. Export report to Excel.
The Transcripts report displays aggregate survey transcripts to review or print

1. Select report type, property type, project, level, and level value using the filters

2. Click to generate a report based on the selected filters. You cannot generate more than 500 transcripts at once

3. View a list of reports you have generated. These reports will also be emailed to you

4. Refresh the list of available reports

5. Open a PDF of your report. Links will be available for 90 days
The Full PDF Reports page provides links to download our comprehensive PDF reports.

PDF reports aggregate the results found in the online reports and are generated once at the conclusion of the survey for select breakdowns.

1. Select report type, property type, project, and level using the filters (all fields are required)
2. View and sort reports by name
3. Search for available reports
4. Download the full report
Action Plans help property teams formalize and execute actionable results from the survey

1. View a list of action plans for all properties you manage

2. Select from the “Action” column to complete or review your action plans

3. Export the list of action plans

Action Planning opens after the survey has closed
### Action Plans - Completing an Action Plan

View a list of questions by category to compare your results to prior performance, company portfolio, and Kingsley Index scores.

1. Select a category to see the questions in the table below.
2. View all questions within a category and compare your scores to the prior performance, company portfolio, and Kingsley Index.
3. Select a question to enter action items or best practices for that area.
4. Export the entire action plan to Excel.

#### Complete Action Plan - Office Property 46

<table>
<thead>
<tr>
<th>Reviewer</th>
<th>Date</th>
<th>Action</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

No comments exist for this Action Plan.

### Category Progress

<table>
<thead>
<tr>
<th>Category</th>
<th>Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Property Management</td>
<td>0 out of 9</td>
</tr>
<tr>
<td>Leasing</td>
<td>0 out of 3</td>
</tr>
<tr>
<td>Property Services</td>
<td>0 out of 2</td>
</tr>
<tr>
<td>Additional Focus Areas</td>
<td>0 out of 2</td>
</tr>
<tr>
<td>Final Comments</td>
<td>0 out of 1</td>
</tr>
</tbody>
</table>

#### Question Details

<table>
<thead>
<tr>
<th>Question</th>
<th>Score</th>
<th>Prior Year</th>
<th>Portfolio</th>
<th>Kingsley Index</th>
<th>Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mgmt. - Overall Satisfaction</td>
<td>4.33</td>
<td>4.44</td>
<td>4.55</td>
<td>4.47</td>
<td>Net Started</td>
</tr>
<tr>
<td>Mgmt. - Accessibility</td>
<td>3.83</td>
<td>4.56</td>
<td>4.66</td>
<td>4.48</td>
<td>Net Started</td>
</tr>
<tr>
<td>Mgmt. - Accommodation of Special Requests</td>
<td>4.40</td>
<td>4.71</td>
<td>4.59</td>
<td>4.42</td>
<td>Net Started</td>
</tr>
<tr>
<td>Mgmt. - Communication</td>
<td>4.17</td>
<td>4.33</td>
<td>4.62</td>
<td>4.45</td>
<td>Net Started</td>
</tr>
<tr>
<td>Mgmt. - Problem Resolution</td>
<td>4.20</td>
<td>4.63</td>
<td>4.53</td>
<td>4.34</td>
<td>Net Started</td>
</tr>
<tr>
<td>Mgmt. - Professionalism / Courtesy</td>
<td>4.67</td>
<td>4.56</td>
<td>4.78</td>
<td>4.64</td>
<td>Net Started</td>
</tr>
<tr>
<td>Mgmt. - Responsiveness</td>
<td>4.50</td>
<td>4.67</td>
<td>4.70</td>
<td>4.51</td>
<td>Net Started</td>
</tr>
<tr>
<td>Property Management Responds Within 24 Hours</td>
<td>80%</td>
<td>100%</td>
<td>92%</td>
<td>90%</td>
<td>Net Started</td>
</tr>
<tr>
<td>Respondents Indicating Contact Preferences Met</td>
<td>83%</td>
<td>83%</td>
<td>79%</td>
<td></td>
<td>Not Started</td>
</tr>
</tbody>
</table>
Complete your action plan and submit it for review

1. Enter your action items or best practices and goal date in the text box

2. Click “Save” after each question

3. Repeat the action planning steps for each question and category

4. Once you have reviewed every question, click “Submit Action Plan” to submit the action plan for your property

Once you submit, you will NOT be able to edit your action plan. The reviewer assigned to your property will receive an email and can approve or reject your action plan.
Action Plans - Reviewing an Action Plan

Review submitted action plans for approval or rejection

If you are assigned to review an action plan, you will receive an email when a plan is ready to review

1. View action plans for each question along with property scores and comparison metrics
2. Enter comments based on your review of the action plan
3. Approve or reject the action plan. If rejected, the submitter will receive an email with your comments and will be able to edit and re-submit the action plan
4. View a history of approvals or rejections
5. Export the action plan to Excel
The Leaderboard displays the top performing and most improved groups within your survey program (e.g., region or property).

1. View rankings for each key question on the survey
2. Filter Leaderboard by level and time range

The Leaderboard only displays after the survey has closed.