



KINGSLEY PORTAL USER GUIDE

KINGSLEY
A Grace Hill Company

Kingsley Portal Overview

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



Logging in to the Kingsley Portal

Portal website URL is <https://www.kingsleyportal.com>
Initial login email provided by Kingsley Associates

The image shows a screenshot of the Kingsley Portal login page. The page features a blue header with the Kingsley Portal logo. The main content area contains a login form with fields for 'Email address' and 'Password', and a 'Log in' button. Below the form is a link that says '1 Trouble logging in?'. To the right of the login form is a large diamond-shaped banner that reads 'CONGRATULATIONS 2020 KINGSLEY EXCELLENCE AWARD WINNERS'. Below this banner is another diamond-shaped banner that reads 'AWARDED TO PROPERTIES THAT EXCEED THE KINGSLEY INDEX IN OVERALL SATISFACTION'. In the bottom left corner, there are two circular award banners: one for '2020 KINGSLEY EXCELLENCE RESIDENT SATISFACTION' and another for '2020 KINGSLEY EXCELLENCE TENANT SATISFACTION'. A text box in the center of the page reads '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

The screenshot shows the Kingsley Portal interface for a 'Sample Client' on 'Tenant Experience Study - Sample'. The navigation bar at the top includes 'Dashboard', 'Response Rates', 'Respondents', 'Reporting', 'Action Plans', and 'Leaderboard'. A dropdown menu for 'Change program' is visible, with 'Tenant Experience Study - Sample' selected. The dashboard displays several key metrics:

- Response Rate:** 63% Responded, 0 Invalid Emails, 1 Unsubscribes.
- Responses:** 45 Total, 38 Satisfied, 7 Neutral, 0 Dissatisfied.
- Renewal Intention:** 69% Likely, 12 Definitely would, 13 Probably would.
- Requests for Contact:** 0 Open, 0 Closed, 0 Total.

The KPIs section shows 'Overall Satisfaction' with a rating of 4.36, compared to a Portfolio average of 4.51 and a KI of 4.26. A bar chart displays satisfaction scores from 2016 to 2020: 4.56, 4.65, 4.32, 4.23, and 4.36. Below this is a table of Regional Managers:

Regional Manager	Score	Response Rate	Invalid Emails	Open Contact Requests
Regional Manager 2	4.23	59%	0	0
Regional Manager 4	4.41	64%	0	0

On the right, a 'Recent Respondents' list includes names like Heather Ogden, Sarah Randall, Amanda Smith, Heather Walker, Kimberly Sharp, Heather Parsons, Heather Morrison, Sam Bailey, Ryan Wallace, and Sebastian Roberts, each with their company ID and response date.

Dashboard

The Dashboard provides a high-level summary of survey metrics in real time

1. Filter data by property type and project

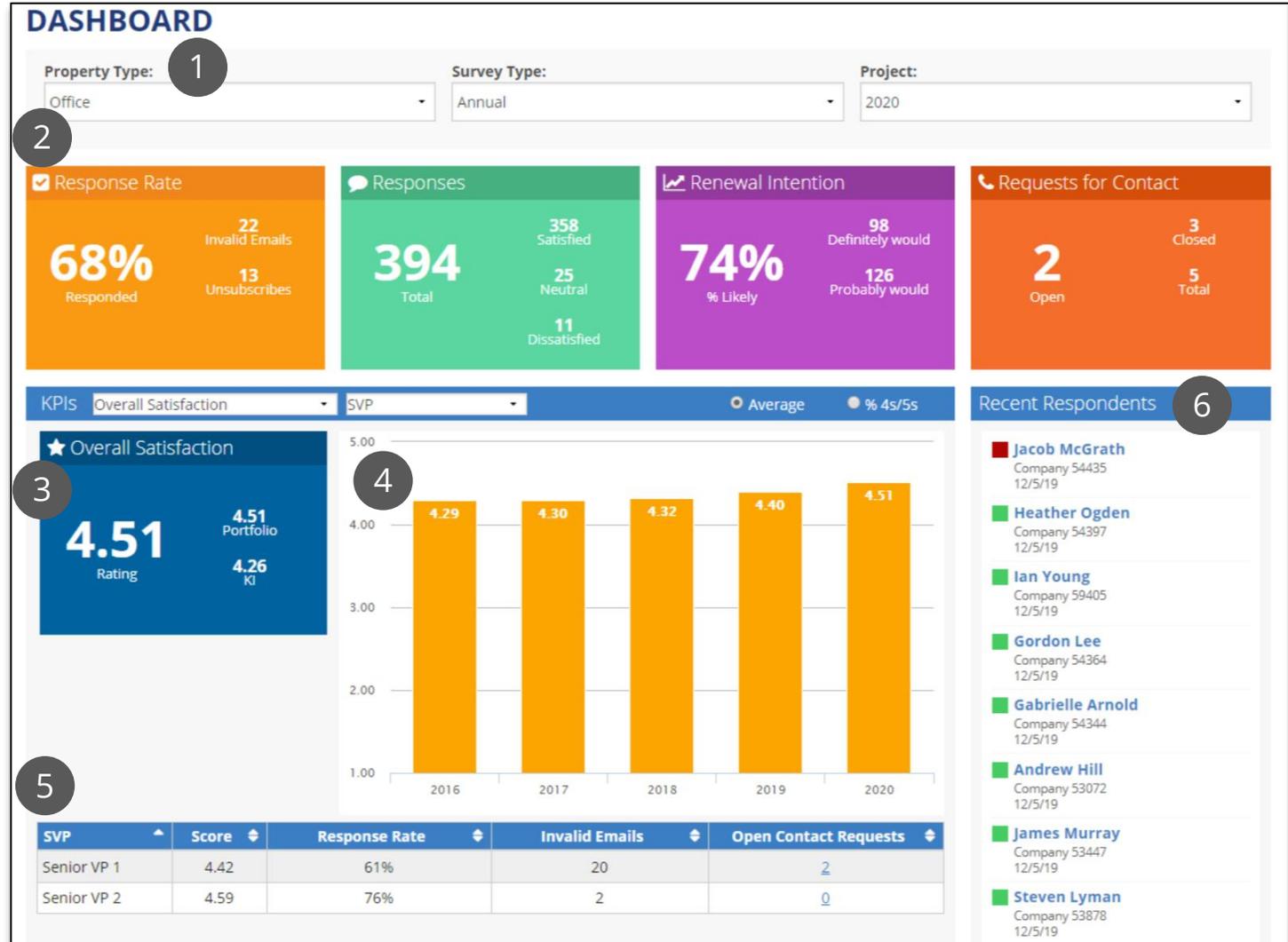
2. Key scores and metrics refresh every hour

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



Response Rates

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 6 [Export Response Rates Data](#)

Property Type: 1 Survey Types: Project:

Group by: 2

Property 3	Response Rate	Responses	Surveys Sent	Undelivered Surveys	Requests for Contact 4	List 5
Sample Client - Office Portfolio (Annual)	67.8%	394	581	22	5	5
User - Office (Annual)	67.8%	394	581	22	5	5
Office Property 139	93.1%	27	29	0	0	📄
Office Property 157	80.0%	8	10	0	0	📄
Office Property 172	28.6%	2	7	0	0	📄
Office Property 174	100.0%	1	1	0	0	📄
Office Property 177	60.0%	15	25	0	0	📄
Office Property 184	50.0%	3	6	2	1	📄
Office Property 185	70.8%	17	24	1	0	📄
Office Property 186	75.0%	6	8	1	0	📄
Office Property 193	84.6%	11	13	0	0	📄

Respondents

The Respondents page provides a full list of all potential survey respondents

1. Filter by property type, project, status, or respondent information

2. Actions: verify, reinvoke, remove, or close requests for contact

3. Edit invalid emails and respondent information

4. View respondent statuses and links to survey transcript

5. Verify respondent information

6. Add internal comment

7. Track and close requests for contact

8. Highlight respondents with low satisfaction or renewal intent

9. Add new respondents

10. Export respondent list

RESPONDENTS

Property Type: All Survey Type: Annual Project: 2020 Status: Responded
Level: Level Value: Search Value: Search Apply

Actions: Please select Submit + Add Respondent Export Respondent List

	Edit	Survey Type	Status	Status Date	✓	📄	📞	★	🔄	Property	Company	Name	Email	Street / Unit	Square Feet
3	✎	Annual	Responded Transcript	12/5/19	✓	📄	📞	★		Industrial Property 163	Company 54429	Jack Jones	Jack.Jones@hotmail.net	#100	0
	✎	Annual	Responded Transcript	12/5/19	✓	📄	📞	★		Industrial Property 171	Company 52815	Ryan Springer	Ryan.Springer@gmail.com	#D	20169
	✎	Annual	Responded Transcript	12/5/19	✓	📄		★		Industrial Property 366	Company 58843	Sean Walsh	Sean.Walsh@outlook.com	#6410	31653
	✎	Annual	Responded Transcript	12/5/19	✓	📄		★		Industrial Property 370	Company 54323	Felicity Bond	Felicity.Bond@gmail.com	#19	1562
	✎	Annual	Responded Transcript	12/5/19	✓	📄		★		Industrial Property 455	Company 53608	Lillian MacLeod	Lillian.MacLeod@aol.com		161378
	✎	Annual	Responded Transcript	12/5/19	✓	📄		★		Industrial Property 5	Company 53703	Molly Parsons	Molly.Parsons@aol.com	#2nd Fl Office	12940

Showing 1 to 500 of 2279 Respondents

500 < 1 2 3 4 5 >

Respondents - Adding a Respondent

Add new respondents to the survey

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

The screenshot displays the 'RESPONDENTS' management interface. At the top, there are filter sections for 'Property Type' (Office, Industrial), 'Survey Type' (Annual), 'Project' (2020), and 'Status' (All). Below these are 'Level Value' and 'Search Value' fields with an 'Apply' button. An 'Actions' section includes a dropdown menu and a 'Submit' button. On the right, there are '+ Add Respondent' and 'Export Respondent List' buttons. A pop-up window titled 'Edit Respondent' is open, showing a 'Property' dropdown and several input fields for 'Contact Information' (Name, Email, Unit), 'Company Information' (Company, Contact Type), 'Lease Information' (Tenant ID, Square Feet, Lease Exp. Date), and 'Additional Information' (Status, Status Date). A 'Save' button is located at the bottom right of the pop-up. Below the pop-up, a table lists existing respondents with columns for status, date, and details. The first row shows a 'Responded Transcript' on 1/26/20 for an 'Industrial Property 115' with contact 'Kevin Avery' at 'Kevin.Avery@ol.com'. The second row shows a 'Responded' status for contact 'Heather Morris' at 'Heather.Morris@ol.com'. The interface includes pagination controls at the bottom, showing 'Showing 1 to 83 of 83 Respondents' and a page number '1'.

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

The screenshot displays the 'RESPONDENTS' interface. On the left, there are filters for 'Property Type' (set to 'All') and 'Level'. Below these are 'Actions' with a dropdown menu and a 'Submit' button. The main area shows a table with columns for 'Edit', 'Survey Type', and 'Status'. The table contains several rows, with the first two rows having a red phone icon and the last two having a green phone icon. A pop-up window titled 'Add/View Portal User Comments' is open over the table. The pop-up shows the respondent's name 'Thomas Hodges' and a checkbox for 'Contact Confirmed' which is checked. Below this is a text area for 'Enter Comment' with a '3' in a circle next to it. At the bottom right of the pop-up is a 'Save' button with a '4' in a circle next to it. A '1' in a circle is placed over the red phone icon in the table row corresponding to the pop-up. A note in the pop-up states: 'Note: Comments are not shared with survey participants. Comments are shared only with Kingsley Portal users.' Below the note is a table for 'Current Comments' with columns 'Date Entered', 'Comment', and 'UserName', which is currently empty.

Date Entered	Comment	UserName
No data available in table		

Showing 0 to 0 of 0 entries

Property Type	Survey Type	Status	Date	Phone Icon	Star	Refresh	Property	Company	Contact	Address
Multifamily Property	Annual	Open	11/30/19	Red Phone	Star	Refresh	656	58986	Yvonne Mathis	#413
Multifamily Property	Annual	Open	11/30/19	Red Phone	Star	Refresh	656	59088	Anne Rampling	#704
Multifamily Property	Annual	Responded	11/30/19	Green Phone	Star	Refresh	656	58986	Yvonne Mathis	#413
Multifamily Property	Annual	Responded	11/30/19	Green Phone	Star	Refresh	656	59088	Anne Rampling	#704

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

RESPONDENTS

Property Type: All Survey Type: Annual Project: 2020 Status: All
Level: Level Value: Search Value: Search **Apply**

Actions: **2** Please select... **Submit** **3** **+ Add Respondent** **Export Respondent List**

1 <input type="checkbox"/>	Edit	Survey Type	Status	Status Date						Property	Company	Name	Email	Street / Unit	Square Feet
<input type="checkbox"/>		Annual	Responded Transcript	12/5/19						Multifamily Property 605	Company 57519	Joshua Howard	Joshua.Howard@aol.com		
<input type="checkbox"/>		Annual	Responded Transcript	12/5/19						Multifamily Property 605	Company 57534	Julian Parr	Julian.Parr@aol.com		
<input type="checkbox"/>		Annual	Responded Transcript	12/5/19						Multifamily Property 605	Company 57574	Kevin Peters	Kevin.Peters@aol.com		
<input type="checkbox"/>		Annual	Responded Transcript	12/5/19						Multifamily Property 605	Company 57577	Kimberly Kelly	Kimberly.Kelly@aol.com		
<input type="checkbox"/>		Annual	Responded Transcript	12/5/19						Multifamily Property 606	Company 58522	Joshua Randall	Joshua.Randall@aol.com	101-C	

Reporting - Report Summary

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

3. Compare scores for key performance indicators

4. Measure overall performance by category

5. View top positive and negative differences in scores

6. Export the report to Excel

This page reflects data collected as of 02/14/2020 03:45:06 AM EST (13 hours ago)

REPORTING

Select a Report Type 1

- Report Summary
- Question Details
- Comments
- Rankings
- Transcripts
- Full PDF Reports

Select Filters

Property Type:

Survey Type:

Time Interval:

Project:

Level:

Level Value:

Apply

TENANT EXPERIENCE STUDY - SAMPLE 2020 PROJECT

Office (Annual)

Compare Against: 2 Export 6

3 KEY PERFORMANCE INDICATORS

Overall Satisfaction	Value for Amount Paid	Renewal Intentions	Mgmt. - Overall Satisfaction	Leasing Process - Overall Satisfaction
4.36	4.13	4.03	4.53	4.33
4.26 Kingsley Index	3.90 Kingsley Index	3.85 Kingsley Index	4.47 Kingsley Index	4.19 Kingsley Index
Rating ↑ 2.2 %	Rating ↑ 6.0 %	Rating ↑ 4.5 %	Rating ↑ 1.4 %	Rating ↑ 3.5 %

4 CATEGORIES

Above Kingsley Index

Below Kingsley Index

of Rating Areas

Overall Questions	100%		4
Property Management	100%		7
Leasing & TIs	100%		5

5 GREATEST DIFFERENCES

Rating Area	Kingsley Index	2020	Diff	Percent Change
Leasing Staff - Responsiveness	4.29	4.83	+12.8%	█
TIs - Timeliness of Process	4.08	4.60	+12.7%	█
Exterior Signage	4.08	4.51	+10.5%	█
Elevator Appearance	4.06	4.42	+9.0%	█

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

REPORTING This page reflects data collected as of 02/14/2020 03:45:06 AM EST (13 hours ago)
*Questions shown had responses collected during the selected time period.

TENANT EXPERIENCE STUDY - SAMPLE 2020 PROJECT

Select a Report Type 1

- Report Summary
- Question Details 2
- Comments
- Rankings
- Transcripts
- Full PDF Reports

Select Filters

Property Type:

Survey Type:

Time Interval:

Project:

Level:

Level Value:

Apply

Office (Annual) 3

View list data by: 4 Compare Against: View Selected Categories: 6 7

Question Name	Answer Type	Total Count	Score	Kingsley Index™	Difference	
Overall Questions						
Overall Satisfaction	Rating	45	4.36	4.26	2.2%	View 5
Property Recommendation	Rating	38	4.42	4.28	3.2%	View
Value for Amount Paid	Rating	30	4.13	3.90	6.0%	View
Renewal Intentions	Rating	36	4.03	3.85	4.5%	View
Renewal Decision Factors	Multiple	29	--	--	--	View
Future Space Requirements	Categorical	36	--	--	--	View
How Has Number of Employees Changed	Categorical	41	--	--	--	View
Property Management						
Mgmt. - Overall Satisfaction	Rating	45	4.53	4.47	1.4%	View
Mgmt. - Accessibility	Rating	43	4.49	4.48	0.1%	View
Mgmt. - Accommodation of Special Requests	Rating	40	4.43	4.42	0.1%	View
Mgmt. - Communication	Rating	45	4.49	4.43	1.3%	View
Mgmt. - Problem Resolution	Rating	43	4.42	4.34	1.7%	View
Mgmt. - Professionalism / Courtesy	Rating	45	4.71	4.64	1.5%	View
Mgmt. - Responsiveness	Rating	45	4.64	4.51	3.1%	View
Property Management Response Time	Categorical	43	--	--	--	View
Current Contact with Property Management	Categorical	42	--	--	--	View
Preferred Contact with Property Management	Categorical	42	--	--	--	View
Familiarity with Emergency Action Plan	Categorical	45	--	--	--	View
Initial Lease Decision						
Priority - Building Quality	Categorical	4	--	--	--	View
Priority - Building's Sustainability Practices	Categorical	4	--	--	--	View
Priority - Exterior Appearance	Categorical	4	--	--	--	View
Priority - Interior Appearance	Categorical	4	--	--	--	View
Priority - Landlord's Financial Stability	Categorical	4	--	--	--	View
Priority - Location	Categorical	4	--	--	--	View
Priority - Management Company Reputation	Categorical	4	--	--	--	View

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Reporting - Question Details

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

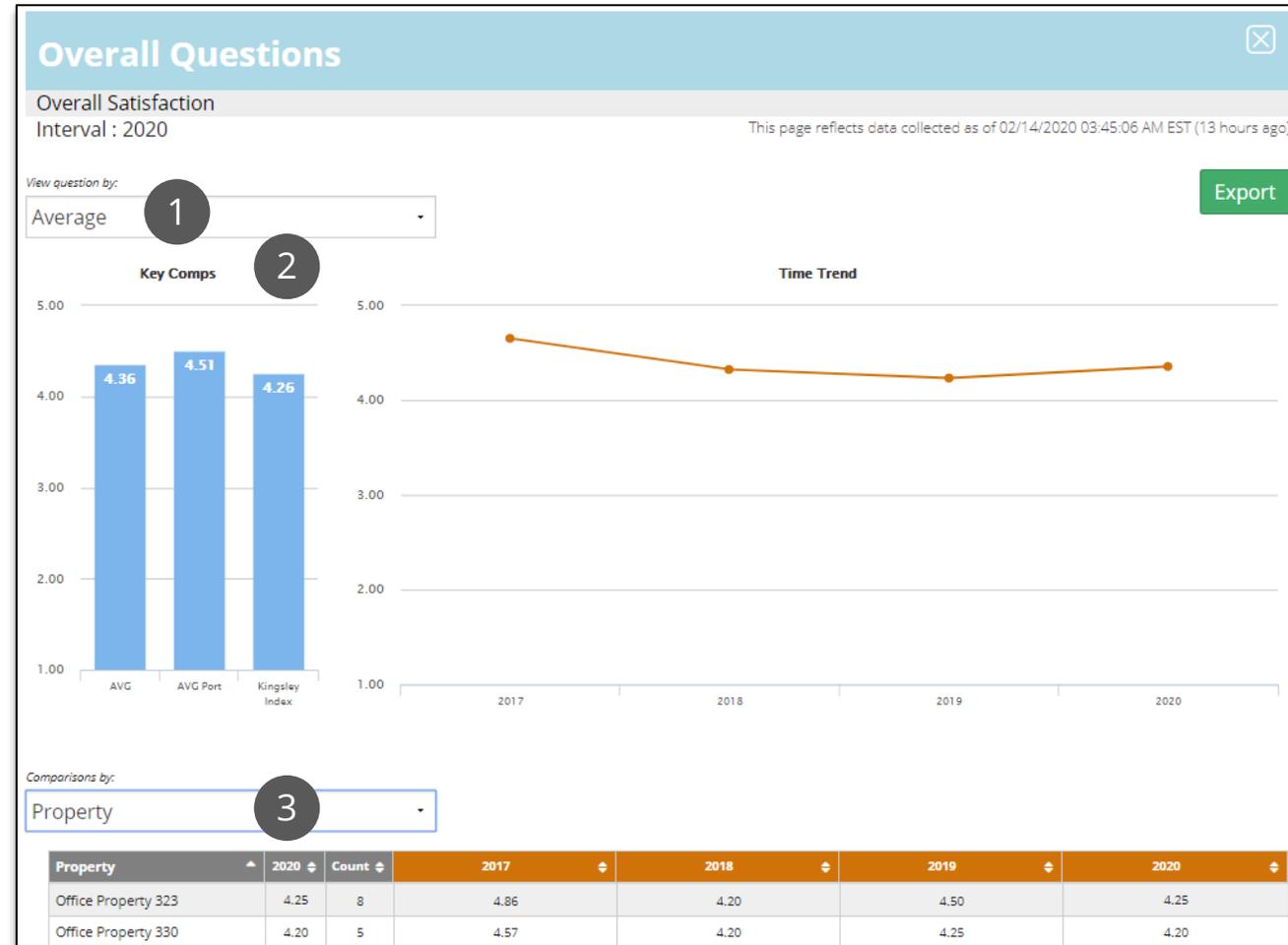
For rating questions, view detailed trends and breakdowns of scores

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



Reporting - Question Details

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

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

Overall Questions ✕

Renewal Decision Factors
Interval : 2020 This page reflects data collected as of 02/14/2020 03:45:06 AM EST (13 hours ago)

Comparisons by: Answer option to compare:

Property ▾

Space requirements ▾

Export

Key Comparisons
Time Trend

Answer Options	2020	Portfolio 2020	Kingsley Index	2017	2018	2019	2020
Amenities	24%	28%	22%	20%	22%	20%	24%
Building upkeep	24%	26%	23%	60%	13%	35%	24%
Building's sustainability practices	7%	9%	8%	7%	13%	15%	7%
Business circumstances	24%	26%	28%	27%	30%	25%	24%
Corporate decision	48%	37%	33%	53%	43%	20%	48%

Space requirements

Property	2020	Answer Option Count	Response Count	2017	2018	2019	2020
Office Property 323	43%	3	7	60%	50%	50%	43%
Office Property 330	50%	1	2	25%	100%	67%	50%
Office Property 46	25%	1	4	50%	67%	75%	25%
Office Property 510	38%	6	16	---	45%	67%	38%

Reporting - Comments

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

The screenshot shows the 'REPORTING' interface for a 'TENANT EXPERIENCE STUDY - SAMPLE 2020 PROJECT'. The interface is divided into a left sidebar and a main content area. The sidebar contains a 'Select a Report Type' section with options: Report Summary, Question Details, Comments (highlighted), Rankings, Transcripts, and Full PDF Reports. Below this is a 'Select Filters' section with dropdown menus for Property Type (Office), Survey Type (Overall), Time Interval (Project), Project (2020), Level, and Level Value. The main content area displays a list of comment categories such as 'Office (Annual)', 'Overall Questions', 'Property Management', and 'Sustainable Building Operations'. Each category has a 'View' button. The 'Overall Questions' section includes 'Verbatim Comments -- Property Strengths' and 'Verbatim Comments -- Property Improvement Areas', each with a 'Cloud' button and a 'View' button. An 'Export All Comments' button is located at the top right of the main content area. The interface also includes a date stamp 'This page reflects data collected as of 05/13/2019 12:00:01 PM EST (9 months ago)' and a note '*Please note that the number of comments directly affects how quickly the report loads.' Numbered callouts 1-5 are placed over the interface to indicate the steps described in the text blocks.

Reporting - Comments

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

Property Management ✕

Verbatim Comments -- Property Management
Interval : 2020 This page reflects data collected as of 05/13/2019 12:00:01 PM EST (8 months ago)

View question data by: Property 1

Showing 1 to 100 of 135 entries Search Page: 1 Per Page: 100 4 Export

Response	Property	Respondent	Date Responded	Mgmt. - Overall Satisfaction
Engineering is very nice and responsive	Office Property 204	Adam MacDonald	11/22/2019	5 - Excellent
Arguably the greatest asset of the complex. The PM team is proactive, responsive, and helpful with any issue we have. Julie Schulze is fantastic, and one of the reasons we are so happy here at Portales.	Office Property 205	Alexander Gray	10/27/2019	5 - Excellent
We love Kim and her entire team! Paul is a fantastic asset to the team as well and assists us with our internal building audit requirements and documentation with any information he is able to provide.	Office Property 559	Amanda Reid	11/16/2019	5 - Excellent
Diana is a great asset to your company! She stands behind your policies and procedures but works with tenants on any issues and follows up. I have heard this same feedback from several tenants in the building. Bob Crowl leads his team well and does a good job of handling situations and following up.	Office Property 139	Amy Bower	11/16/2019	4 - Good
Doing a good job:)	Office Property 139	Amy MacDonald	11/22/2019	5 - Excellent
We have provided the emergency contact information to Tom Daly and his Security Team. Everyone we work with here has been absolutely the best.	Office Property 184	Andrea Ince	10/25/2019	4 - Good
The frequency of proactive checks with us (weekly if not more often...sometimes every few days) was due to the fact we were new tenants in a completely rebuilt space. So Don, Kim, Ron and Josh worked with us much more closely during our first few months in 1290 Broadway to ensure our needs were met. I feel that likely check ins will be less often needed as we have now settled in. All of the onsite staff I mentioned are terrific! Very thoughtful and helpful individuals. All easy to collaborate with. Attentive to our requests.	Office Property 4	Anthony Vaughan	11/24/2019	5 - Excellent
Been in this building 12 years - seems like it's been at least 2 years since we've had a planned fire drill. Isn't that still required by law?	Office Property 177	Audrey Gray	11/1/2019	5 - Excellent
Maddie is great and always very helpful. Property Manager and	Office Property 260	Austin Bamaling	11/16/2019	4 - Good

Reporting - Rankings

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

REPORTING This page reflects data collected as of 02/14/2020 03:45:06 AM EST (13 hours ago)

TENANT EXPERIENCE STUDY - SAMPLE 2020 PROJECT

Office (Annual)

1 Select a Report Type

- Report Summary
- Question Details
- Comments
- Rankings**
- Transcripts
- Full PDF Reports

2 Group by: Property | Question: Overall Satisfaction | Compare Against: Kingsley Index™ | Data Type: Average **4** Export

3

Property	Kingsley Index™	2020 Avg	Response Count	Difference	
Office Property 510	4.26	4.46	26	4.7%	
Office Property 323	4.26	4.25	8	-0.2%	
Office Property 330	4.26	4.20	5	-1.4%	
Office Property 46	4.26	4.17	6	-2.2%	

Select Filters

Property Type: Office

Survey Type: Overall

Time Interval: Project

Project: 2020

Level:

Level Value:

Reporting - Transcripts

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

REPORTING Generated reports will be available on this page for 90 days. Please consider downloading the reports to your computer.

Select a Report Type **1**

- Report Summary
- Question Details
- Comments
- Rankings
- Transcripts**
- Full PDF Reports

TENANT EXPERIENCE STUDY - SAMPLE 2020 PROJECT

Office (Annual)

Available Transcript Reports: **3** [Refresh Report List](#) **4**

Level	Property Type	Project	Generated	Status
Property / Office Property 323	Office	2020	02/14/2020	Ready - Download Here 5

Select Filters

Property Type: Office

Survey Type: Overall

Time Interval: Project

Project: 2020

Level: []

Level Value: []

2 [Generate](#)

Reporting - Full PDF Reports

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

The screenshot displays the 'REPORTING' interface. On the left, a sidebar contains a 'Select a Report Type' section with options: Report Summary, Question Details, Comments, Rankings, Transcripts, and Full PDF Reports (highlighted in purple). Below this is a 'Select Filters' section with dropdown menus for Property Type (Office), Time Interval (Project), Project (2020), and Level (Property). An 'Apply' button is at the bottom of the filters. The main content area has a purple header 'TENANT EXPERIENCE STUDY - SAMPLE 2020 PROJECT' and a sub-header 'Property - Office (Annual)'. A search bar is on the right. A table with one entry is shown, with a blue header 'Report Name' and a row containing 'Sample Client Office Office Property 510 Property Report' and a 'Download' button. A 'Showing 1 to 1 of 1 entries' message is below the table. Numbered callouts 1-4 are placed over the interface to correspond with the steps on the left.

Action Plans

Action Plans help property teams formalize and execute actionable results from the survey

Action Planning opens *after* the survey has closed

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

Project
2020 Customer Satisfaction Assessment (02/20/2020 - 04/01/2020) Export Action Plan 3

1

Property Type	Property	Status	Progress	Action	Submitter	Reviewer
Industrial	Industrial Property 7	In Progress	3 out of 3	Complete Action Plan	demo@kingsleyassociates.com	demo@kingsleyassociates.com
Industrial	Industrial Property 115	Complete	0 out of 12	Review Action Plan	demo@kingsleyassociates.com	demo@kingsleyassociates.com
Office	Office Property 323	In Progress	0 out of 17	Complete Action Plan	demo@kingsleyassociates.com	demo@kingsleyassociates.com
Office	Office Property 46	In Progress	0 out of 17	Complete Action Plan	demo@kingsleyassociates.com, property-manager@test.com	demo@kingsleyassociates.com
Office	Office Property 330	Complete	17 out of 17	Review Action Plan	demo@kingsleyassociates.com	demo@kingsleyassociates.com
Office	Office Property 510	In Progress	0 out of 17	View Action Plan	No Submitter Email	No Reviewer Email

Showing 1 to 6 of 6 entries

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

[Back to List](#)

[Export Action Plan](#) 4

Reviewer	Date	Action	Comment
No comments exist for this Action Plan.			

Category	Progress	
Property Management	0 out of 9	Select
Leasing	0 out of 3	Select
Property Services	0 out of 2	Select
Additional Focus Areas	0 out of 2	Select
Final Comments	0 out of 1	Select

Question	Score	Prior Year	Portfolio	Kingsley Index	Progress	
Mgmt. - Overall Satisfaction	4.33	4.44	4.66	4.47	Not Started	Select
Mgmt. - Accessibility	3.83	4.56	4.66	4.48	Not Started	Select
Mgmt. - Accommodation of Special Requests	4.40	4.71	4.59	4.42	Not Started	Select
Mgmt. - Communication	4.17	4.33	4.62	4.43	Not Started	Select
Mgmt. - Problem Resolution	4.20	4.63	4.53	4.34	Not Started	Select
Mgmt. - Professionalism / Courtesy	4.67	4.56	4.78	4.64	Not Started	Select
Mgmt. - Responsiveness	4.50	4.67	4.70	4.51	Not Started	Select
Property Management Responds Within 24 Hours	80%	100%	92%	90%	Not Started	Select
Respondents Indicating Contact Preferences Met	83%	83%	79%		Not Started	Select

Action Plans - Submitting an Action Plan

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

Category	Progress	
Property Management	0 out of 9	Select
Leasing	0 out of 3	Select
Property Services	0 out of 2	Select
Additional Focus Areas	0 out of 2	Select
Final Comments	0 out of 1	Select

Question	Score	Prior Year	Portfolio	Kingsley Index	Progress	
Mgmt. - Overall Satisfaction	4.33	4.44	4.66	4.47	Not Started	Select
Mgmt. - Accessibility	3.83	4.56	4.66	4.48	Not Started	Select
Mgmt. - Accommodation of Special Requests	4.40	4.71	4.59	4.42	Not Started	Select
Mgmt. - Communication	4.17	4.33	4.62	4.43	Not Started	Select
Mgmt. - Problem Resolution	4.20	4.63	4.53	4.34	Not Started	Select
Mgmt. - Professionalism / Courtesy	4.67	4.56	4.78	4.64	Not Started	Select
Mgmt. - Responsiveness	4.50	4.67	4.70	4.51	Not Started	Select
Property Management Responds Within 24 Hours	80%	100%	92%	90%	Not Started	Select
Respondents Indicating Contact Preferences Met	83%	83%	79%		Not Started	Select

Mgmt. - Accessibility

Action Plan
Significantly Below KI
(This is an area where improvement is desired. Please take the time to review with your team and identify tangible action steps to improve satisfaction in this area. These action items should be Specific, Measurable, Action-oriented and Realistic)

1

When do you estimate you will enact the aforementioned action steps and/or meet the desired goal(s)?

12/13/2019

2 Save Submit Action Plan 4

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

Review Action Plan - Office Property 330

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[Export Action Plan](#) 5

2

3

[Approve Plan](#) [Reject Plan](#)

Office Property 330
Complete

Approval History

Reviewer	Date	Action	Comment
demo@kingsleyassociates.com 4	01/21/2020	Rejected	

Property Management

Question	Score	Prior Year	Portfolio	KI	Responses
Mgmt. - Overall Satisfaction	4.40	4.25	4.66	4.47	We have an open door policy with our tenants and visit them on a regular basis to insure that they feel comfortable reaching out to us with any questions or concerns that they may have. We also conduct tenant meetings routinely to address any concerns that they may have.
Mgmt. - Accessibility	4.60	4.75	4.66	4.48	We communicate any upcoming projects or special work that will be conducted in the building and tenant suites as quickly as possible. We routinely communicate by email or in person to follow up on any items that we are working to resolve or have resolved to make sure that the tenants are pleased with the results.

Leaderboard

The Leaderboard displays the top performing and most improved groups within your survey program (e.g., region or property)

The Leaderboard only displays *after* the survey has closed

1. View rankings for each key question on the survey

2. Filter Leaderboard by level and time range



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