

5 tips for follow-ups that feel personal, not automated

Smart AI starts with connected data

Follow-up intelligence means prospects get personalized messages before and after every tour.

When your CRM, leasing and property data live on the same platform, every follow-up draws from each prospect's personal preferences and previous conversations.

Tour completed

Hi Maya, it was great meeting you **yesterday**. The **two-bedroom** floor plan you liked is available for your **June move-in**. Would you like the current pricing?

2-bedroom interest

June move-in

1

Meet them where they are

Meet each prospect on the channel they prefer. If the prospect stops responding, automatically shift to another channel so a missed message doesn't result in a missed conversion.



Connected data follows the prospect's journey from the first touch, so **no two leads get treated the same**.

2

Remember the whole conversation

Don't make prospects start from the beginning every time. Remember what was said days or weeks ago. Account for every prior chat, call, email and text so each message feels like a continuation of the conversation. Conversations pick up right where they left off and never feel disjointed.



When CRM and leasing activity live together, **AI uses the prospect's full history**.

3

Know their history, not just their latest inquiry

Has the prospect toured before?
Asked about another community?
Interacted with a sister property in the portfolio?
Portfolio-wide context makes follow-ups far more relevant.



A holistic view of your data builds a **complete prospect record** and noticeably smoother customer experience.

4

Follow up based on what actually happened

Let activity trigger the next message, not a fixed schedule. After a completed tour, the personalized follow-up should reflect that visit and arrive at the right moment: **automatically the following day**.



Connected tour and CRM data lets automation **respond to past activity**, rather than relying on generic sequences.

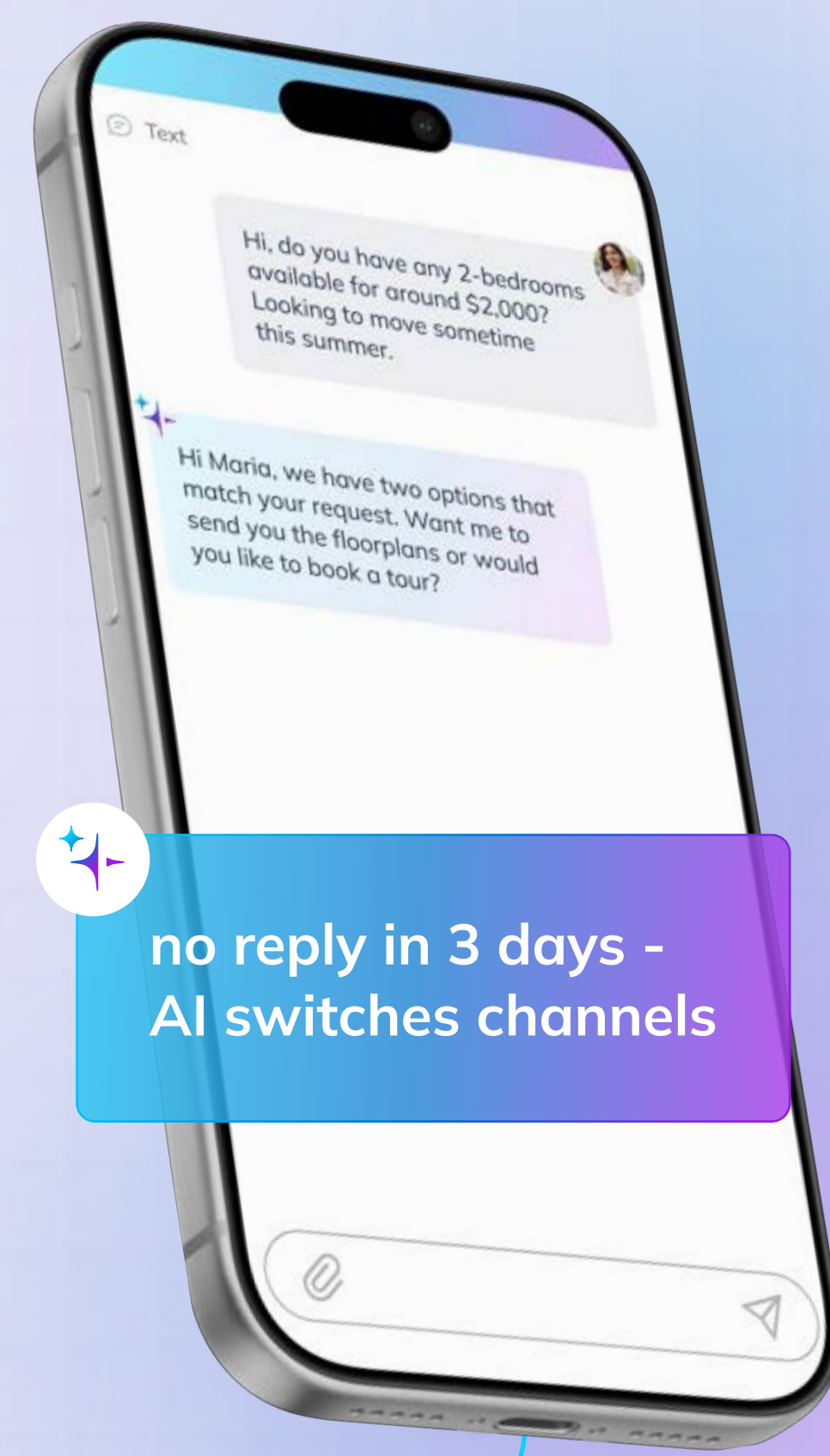
5

Personalize beyond the first name

"Hi, [First Name]" isn't meaningful personalization anymore. Draw from each prospect's interests, interactions with the property and where they are in the leasing journey.



The real edge is that the AI builds the record as it goes, not just reads from it. Working from the complete record, including your leasing agent's notes, it captures what prospects share and turns it into context for the next follow-up.



no reply in 3 days - AI switches channels



New email
Hi Maria, want me to hold a tour time this week?



My timeline moved up, I need to be in by May and a home office is a must. Anything with a den or a third room?

new properties surfaced
info updated
new tour slots sent

TOUR BOOKED



Oakline
Toured • yesterday



Riverstone
Toured • 4 weeks ago



Great meeting you at Oakline yesterday, Maria! The den in unit 214 would make a great home office, and it's available for a May 1 move-in like you needed. Want me to **start your application** while it's open?



Application

What makes it possible

A follow-up can only feel as personal as the data the AI has access to. When AI can access the prospect's full, up-to-the-minute story in one place, it can truly personalize the entire communication experience.



CRM IQ
keeps one unified record per prospect across every property



Chat IQ
reads every prior interaction and responds to what happened

Part of **Virtuoso Enterprise**,
Yardi's AI platform for multifamily.

yardi.com/multifamily-ai

