Prescreen Call Script

From the Chimi Rental playbook (chimirental.com/playbook). This is a starting point that we use for our own rentals, shared as-is and without warranty. It is not legal advice. Adapt it to your state, city and situation, and have a local attorney review anything that affects someone's tenancy or money.

Ask every caller the same questions, in the same order. Write the answers in the lead record as you go.

1. Open

> Hi [Name], this is [Your name] with [Company]. You reached out on [Zillow / Facebook / ...] about the [beds]-bed, [baths]-bath home on [street]. Is now still a good time?

2. The home

> Let me tell you a bit about it. It's about [sq ft] square feet, with [beds] bedrooms, including [a primary suite], and [baths] bathrooms. [Layout: what's upstairs and down.] It has [a backyard / laundry hookups / a washer and dryer], and comes with [fridge, stove, ...].
>
> Any questions about the home so far?

3. Terms and criteria

> The rent is $[Rent] a month and the security deposit is $[Deposit].

- Pets are $[35] per pet per month, up to [2], and pet rent is non-refundable. [Mention weight and breed limits from your insurer if any.]
- We need a combined household income of at least three times the rent. For this home that's $[3 × Rent] a month.
- We need an average credit score of [580] or higher.
- No smoking of any kind, inside or outside.
- Every adult who'll live there fills out an application, with a $[35] non-refundable screening fee per adult.

> Does all of that work for you?

(If not: thank them, and end the call kindly.)

4. About them (ask everyone the same)

- When are you hoping to move in? And roughly how long would you like to stay?
- Who would be living in the home? How many adults?
- What do you do for work? And the other adults?
- Any pets? What kind, how many, how big?
- Does anyone in the household smoke?
- Have you had an eviction, or do you owe money to a previous landlord?

Don't ask about anything related to a protected class: race, color, religion, sex, national origin, familial status, disability, or anything your state or city adds.

5. The process

> Sounds like it could be a good fit. Here's how it works. First, you come see the home. If you like it, we'll send you an online application. It includes a credit and background check, about $[35] per adult. You'll upload a photo ID, your three most recent pay stubs and three months of bank statements.
>
> Does that sound good? Let's find a time for you to see it.

6. Book it

> Great, I have you down for [day, date] at [time]. I'll text you the address and details right now.

→ Send the showing confirmation message. Put a reminder on your calendar to confirm **the day before**.

Common questions

"My credit is below the minimum. I'm working on it." Ask what happened, and listen. Explain honestly that you can't promise anything when others are applying, and that [if your policy allows it] qualified applicants with a lower score can sometimes be approved with a larger deposit, within the legal limit. Give the same answer to everyone in the same situation.

"Do you allow dogs?" Up to [2] pets. Give the specific weight and breed rules from your insurer, and say the dog must be house-trained. Service and assistance animals are not pets and aren't subject to pet rules or pet rent.

"Can I see it today?" If you can, sure. Same-day showings rent homes. Still send the confirmation with the criteria.