Clarendon
ADVISORY GROUP

Resident Experience Self-Assessment

Twenty-one standards across seven resident moments, completed in about ten minutes.

Rate each standard as it operates today, not as it is written in policy.

0 = Not in place **1** = In place but inconsistent **2** = Consistently in place

	STANDARD	0	1	2	0–100
01 First Inquiry	Phone, email and web inquiries receive a personal response within one business hour.	☐	☐	☐	SCORE
	Every response names the community, answers the question asked and offers a clear next step.	☐	☐	☐	_____
	Unanswered inquiries are reviewed and resolved daily.	☐	☐	☐	
02 The Tour	Tours follow a defined route through a model, the amenities and a clean, finished path.	☐	☐	☐	SCORE
	The tour guide learns the prospect's needs before presenting features.	☐	☐	☐	_____
	Every prospect receives a personal follow-up within 24 hours of the tour.	☐	☐	☐	
03 Application	Applicants know which documents are required and how long approval takes.	☐	☐	☐	SCORE
	Status updates are sent at each step without the applicant having to ask.	☐	☐	☐	_____
	Verification steps are applied the same way to every applicant.	☐	☐	☐	
04 Move-In	Every home passes a documented inspection before keys are released.	☐	☐	☐	SCORE
	New residents receive a welcome with key contacts and how to submit requests.	☐	☐	☐	_____
	The team contacts each resident within the first week to resolve any issues.	☐	☐	☐	
05 Work Orders	Residents receive a confirmation and an expected timeline when a request is submitted.	☐	☐	☐	SCORE
	Residents are told when work is complete and what was done.	☐	☐	☐	_____
	Repeat requests for the same issue are flagged and reviewed.	☐	☐	☐	
06 Daily Living	Common areas and amenities are inspected on a set schedule.	☐	☐	☐	SCORE
	Amenity outages are posted with a repair timeline and regular updates.	☐	☐	☐	_____
	Online reviews receive a personal response that names the concern and the action taken.	☐	☐	☐	
07 Renewal	Renewal conversations begin at least 90 days before lease end.	☐	☐	☐	SCORE
	Residents are asked about their experience before receiving a renewal offer.	☐	☐	☐	_____
	Reasons for non-renewal are recorded and reviewed each quarter.	☐	☐	☐	

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SCORING

How to calculate your score

STEP 1 | MOMENT SCORE

Moment Score = (sum of the three ratings ÷ 6) × 100

Round to the nearest whole number. Six is the highest possible total for a moment.

STEP 2 | EXPERIENCE INDEX

Experience Index = sum of the seven Moment Scores ÷ 7

Round to the nearest whole number. The index runs from 0 to 100.

WORKED EXAMPLE | FICTIONAL COMMUNITY

MOMENT	RATINGS	TOTAL	MOMENT SCORE
First Inquiry	2 + 1 + 1	4 of 6	67
The Tour	2 + 2 + 1	5 of 6	83
Application	2 + 1 + 2	5 of 6	83
Move-In	1 + 1 + 1	3 of 6	50
Work Orders	1 + 0 + 1	2 of 6	**33**
Daily Living	2 + 1 + 1	4 of 6	67
Renewal	1 + 1 + 0	2 of 6	**33**

Work Orders: (1 + 0 + 1) ÷ 6 × 100 = 2 ÷ 6 × 100 = 33.3, which rounds to **33**.
Experience Index: (67 + 83 + 83 + 50 + 33 + 67 + 33) ÷ 7 = 416 ÷ 7 = 59.4, which rounds to **59**.

READING THE RESULTS

80–100	**Strong.** The standard holds. Protect it through onboarding and periodic spot checks.
50–79	**Inconsistent.** The experience depends on who is working. Document the standard and train to it.
Below 50	**Priority gap.** Residents are likely noticing. Address these moments first.

In the example, Work Orders and Renewal fall below 50 and would be the first priorities. Both moments weigh heavily in whether residents decide to renew.

A self-assessment shows where to look.

A Service Standards Assessment shows what residents actually experience, through mystery shops, walkthroughs, review analysis and team observation.

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