



## Solstice Senior Living INQUIRY SHEET

"Whom do I have the pleasure of speaking with today?" NAME: \_\_\_\_\_

"How are you doing today?" (LISTEN!) \_\_\_\_\_

*Use prospect's name throughout the call or on the tour!*

"In the event that we are disconnected, may I have your phone number?" \_\_\_\_\_

*"Before we get started, I just want to inform you that I am here to help regardless of whether we are a good fit. I have been in this industry for a long time, so please feel free to utilize me as a resource!"*

"Tell me, what is going on with your loved one/current situation?" \_\_\_\_\_

"Where is your loved one currently living?" \_\_\_\_\_

"Is your loved one ambulatory?" \_\_\_\_\_ "Age of loved one?" \_\_\_\_\_

"Time frame? *The reason I ask is that we have limited availability, and I want to ensure we will have an apartment.*"

"Decision-maker?" \_\_\_\_\_

"What are some things that your loved one is interested in?" \_\_\_\_\_

"What other communities have you looked at, or plan to visit?" \_\_\_\_\_

"What are some important factors that you are looking for within a community?" \_\_\_\_\_

FINANCIALS (Delicately ask the following questions.)

**"Do you know if your loved one would qualify for V-A benefits, or does your loved one have long-term care coverage?"**  
(This is a great way to determine if the family can afford your community.)

Tell families that seeing your community would be the best way for you to assess whether or not they can picture their loved one living here. Give them two options of what your availability is and secure a date and time for the tour!  
If this is a scheduled tour, proceed to tour and be sure to introduce prospect to as many department heads as you can.

Next Steps: \_\_\_\_\_ Email: \_\_\_\_\_

Home Address: \_\_\_\_\_

What is your favorite beverage? \_\_\_\_\_

Date of Tour: \_\_\_\_\_ Apartment # Held: \_\_\_\_\_

DEPOSIT AMOUNT: \_\_\_\_\_ DATE DEPOSIT GIVEN: \_\_\_\_\_ CONCESSION: \_\_\_\_\_