



This form is used once the virtual tour is completed.

Date: _____

Customer's Name: _____

Potential Resident's Name: _____

Confirmed Phone Number: _____

"It's so good to connect with you again! I hope you enjoyed the videos I sent over."

"Did they address the areas you wanted to see the most?"

In addition to confirming it's the right apartment, be sure to address the
Top three Concerns and how we will provide a solution for each of them.

"What did you like the most? What did you like the least?"

"Did your mom/dad get to see it too? What did he/she think of it?"

If Applicable

"How did the call with the home care agency go?"

“How did the call with (Director’s Name) go? Did you get all of your questions answered?”

“OK, so our next step is to make sure everything is ready for him/her and that this is a smooth transition. Let’s start the process by placing the Community Fee down and select a date for him/her to take possession of the apartment. Now, this doesn’t mean he/she has to physically be here on that date. It just takes the apartment off the market and makes it his/hers at that point.”

Confirm Apartment # _____

Complete Community Fee Slip _____

If not able to collect Community Fee, then gain first right of refusal with the Waitlist Deposit and confirm the Financial Move-In Date.

Send Depositor OneDay Video

If Community Fee or Deposit was not collected today, then confirm your agreed-to next step in addition to the mandatory video, WOW gift and handwritten note.

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| <input type="checkbox"/> Additional Virtual Tour | <input type="checkbox"/> Introduction to their loved one | <input type="checkbox"/> Porch Visit |
| <input type="checkbox"/> Contact VA | <input type="checkbox"/> Contact Realtor | <input type="checkbox"/> CF/Deposit |
| <input type="checkbox"/> Respite Stay | <input type="checkbox"/> Assistance with move prep | <input type="checkbox"/> Other |

Date/Time of specific Next Step with the customer:

Date/Time of Next Step with the referral source:
