



Outreach Visit Pre-Planning Worksheet

Do Your Homework:

- How many outreach visits were completed over the last 12 months: _____
- How many referrals were received over the last 12 months: _____
- How many move-ins occurred over the last 12 months: _____
- Do you have anyone referred by this source that is currently living in the community?
 - Name: _____
- Who, if anyone, have they referred in the last 2-3 months & what is status of referral:

- Is there more than 1 contact for this source? _____
 - Names: _____
- Has there been a change in the referral pattern? _____

Schedule the Appointment:

- Date/Time/Locations: _____
- ***Objective of Visit*:** (If you don't have an objective what's the point?)

Pre-Qualifying Questions:

- What is your patient/client base population?
- What is the payer source of your patient/client base?
- How often do you make referrals?
- When you refer, who do you refer to?
- How often do you refer to independent or assisted living?
- When you see the need for a change in living arrangements, do you bring up the topic, or do you wait until asked?

Relevant Rapport:

- Why did you decide on this profession, and why do you still do it?
- What gets in your way of what you dreamed of accomplishing when choosing this profession?

Questions to Develop Needs:

- When you refer, what is your process in doing so?
- Tell me what works well with the process?
- Tell me what you find cumbersome about the process?
- Tell me what your expectations are of the business taking the referral?
- Why might you refer to someone else rather than us?
- Are we able to improve upon the way we handle referrals for you? (Assuming that they have referred to us recently)
- Name one thing that would make your job easier?

Solution:

Confirmed Next Step:

Date: _____ Time: _____