



CALL FLOW FORM

POST-TOUR

This form is used once the tour is completed.

Date: _____

Customer's Name: _____

Potential Resident's Name: _____

Confirmed Phone Number: _____

Check in and Build Rapport

"I hope you enjoyed your visit with us yesterday. It was a pleasure having you at our community. What did you think?"

Ask for the Commitment

"It definitely sounds like our community would be a good fit for you/your mom/your dad. My recommendation is to go ahead and put down the community fee and select a date to take possession of the apartment. Now, this doesn't mean you/he/she has to move in on that date. It just makes the apartment available to get it set up, and it takes the apartment off the market."

Confirm Apartment # _____

Complete Community Fee Slip _____

If not able to collect the community fee and sign the lease agreement today, attempt to schedule a future date to complete those steps.

If those options don't work, follow the seven-day post-tour follow-up protocol. Here are some additional ideas for follow-up.

- Additional tour**
- Home visit**
- WOW follow-up gift**
- Send handwritten note**
- Invite to an event/activity**
- Offer respite stay**
- Offer assistance with the move**
- Contact VA**
- Contact Realtor**
- Introduction to their loved one**
- Drop CF/Deposit option**

Date/Time of specific Next Step with the customer:

Date/Time of Next Step with the referral source:

DOS Note: Be sure to follow up with the home care agency if needed.