



## CALL FLOW FORM

# PRE-TOUR

Date: \_\_\_\_\_

Customer's Name: \_\_\_\_\_

Potential Resident's Name: \_\_\_\_\_

Relation to Potential Resident: \_\_\_\_\_

How did you hear about us: \_\_\_\_\_

**Ensure an introduction is completed for every call!**

**“In the event we get disconnected, may I confirm your contact information?”**

Spelling of name(s): \_\_\_\_\_

Main phone number: \_\_\_\_\_

Alternate phone number: \_\_\_\_\_

Email: \_\_\_\_\_

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

**“Thank you for that information! It’s nice to meet you over the phone, (prospect name). Tell me what prompted you to look into senior living, and how may I be helpful?”**

Take note of any **Red Words!**

**Examples of Red Words:** Stressed, worried, concerned, overwhelmed, unsure, confused, etc.

Our goal is to get them from the **Red Words** to the **Blue Words!**

**Examples of Blue Words:** Relieved, glad, assured, certain, grateful, better, etc.

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**“Just based on the information you’ve shared with me, I can tell you others have reached out for the same reason and we’ve been a good option. But, can I get your permission to ask a few more questions to be sure?”**

**“Where does (resident name) currently live, and is anyone including yourself helping him/her right now?”** If the answer is yes, find out who is doing what for him or her. This is critical for you to know!

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**Focus on not just the physical needs but the spiritual, mental, emotional and social needs too! Ask questions to learn more.**

**Examples:** running errands, social interaction, grocery shopping, meal preparation, medical appointments, keeping up with current home and yard, sense of security, care (family assist, home care or home health), etc.

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**Is home care or family assistance already in place, or is it needed? If they are currently getting assistance, what type and from whom?**

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**Write down top three concerns you heard him/her say.**

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**“What are some things he/she used to do or enjoy that have changed over time?”**

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**“What does he/she do now that he/she still enjoys?”**

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## **Validate Needs & Personal Interests**

**“It sounds like your main concern is that (prospect name) is no longer eating well. Is that correct? Do you know what caused the change?”**

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## **Empathize Needs & Personal Interests**

**“I’m sorry to hear about the challenges your mom/dad is experiencing. I want to reassure you that we are definitely able to help him/her with that.”**

**“Outside of his/her meals, is he/she getting along well in other ways?”**

List any other needs not already mentioned tied into physical, spiritual, mental, emotional and social parts of his/her life.

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## **Empathize Needs & Personal Interests Again**

**“I’m sorry to hear that he/she is also getting depressed from being alone so much. Not only can we help him/her with meals three times a day, but we can also help with his/her feelings of loneliness.”**

Explain briefly the top selling points and how we can support daily socialization.

**“Is (prospect name) aware that you are looking around? How does he/she feel about it?”**

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**“Have you or other family members spoken to other communities? What are your thoughts so far? What do you like? What do you not like?”**

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**“Is anyone else involved in the decision other than you and your mom/dad?”**

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**“Assuming you found the right community, is there anything that would prevent you from making the move?”**

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## **Finances**

**“Our starting rates begin at \$XXXX.XX a month. Does that appear to be within your loved one’s budget?”**

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**“That’s fine if you’re not sure. I can give you some suggestions of what to look into if that helps at all. Just let me know.**

**Examples:** In addition to monthly income, it’s important to also look at any assets that will be liquidated such as investments, property and real estate, as well as eligibility for programs such as the VA Aid & Attendance.

## **Next Steps**

**“Based on our conversation, I am confident your mom/dad would thrive at our community. It will be important that we partner together in taking this further to help your mom/dad. The next step would be to give him/her an idea of what it’s like to live here. The best way to do that is to invite you both to visit our community.”**

**“I can be flexible. Do you prefer morning or afternoon?” \_\_\_\_\_**

**“Before we jump off, let’s confirm your preferences. Were you most interested in our one-bedroom apartment? If unsure, we can review our community website together and I will show you some of our floor plans to give you a better idea.”**

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**Date/Time of Tour:**

**Date/Time of home care introduction  
if needed:**

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**If tour took place, advance to the post-tour call flow form.**