



## How To Conduct a Home Visit

### Why should I conduct a home visit?

Home visits are part of the [7-day follow-up plan](#) after a tour. The purpose of a home visit is to build a relationship with prospects, making them more likely to tour the community, attend an event or move in. Historically, when a community consistently conducts home visits with their prospects, move-ins increase.

### How do I conduct a home visit?

Home visits are all about building a strong personal connection with a prospect and showing them that you care. They can be particularly impactful around the holidays, when family members and influencers can see your efforts or when seniors may be particularly lonely.

**Identify seniors in need of a visit.** The Solstice standard is to conduct at least one home visit per week. Think about prospects who mentioned being overwhelmed by managing things at home during their tour, those who live alone and are seeking more community, or those who live far from family.

If the prospect isn't ready to come in for a tour – this is a great opportunity to go to them. Home visits are a great way to build a relationship that makes a prospect feel more comfortable coming in for a tour. Phone discovery can help you identify the right people for a home visit.

**Schedule your visit.** *About three days after a tour takes place is the perfect time. Bring another team member along with you.*

**Come with a game plan.** There are several ways to spend a home visit. Depending on the senior's needs, the visit can be short or long and should be focused on building a relationship and gaining a better understanding of their hesitations. Some ideas include:

- **Bringing a meal**
- **Decorating or cleaning together**
- **Looking at family photos**
- **Conducting a safety check**
- **Conducting a social visit**
- **Dropping off a WOW gift**

*If a safety check is needed, be sure to bring a home care partner to the visit.*

**Establish a clear next step and follow up.** As you wrap up your home visit, it's important to be clear about what happens next, such as touring the community or conducting another home visit. Be sure to follow up with the prospect after the visit as a reminder of the next steps.

**Spread the word.** Keep all of the influencers in the loop so they know that you have visited, and they can talk with the prospect about the experience. This can include children, referral sources and more. The impact of this can be overlooked until you receive a thank you call from an adult child who can't believe how you brightened their parent's day with a simple visit.

A home visit is an investment that pays off in the long run. Use this guide to create a consistent practice, and share your results with your RDS!

