



# Tour Information Sheet

*Utilize this form for a family/resident during a tour*

For the tour process, follow the sit tour sit process.

Start off tour by making a connection and offering a warm welcome, have the team introduce themselves and get connected, offer if the inquirer would like a drink before beginning the tour.

Gather introductory information before proceeding with the tour.

## Contact Information

Inquirer's Name: \_\_\_\_\_ Date of Inquiry: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

Future Resident Name: \_\_\_\_\_

## Situation-Understanding the Dynamics

- What brings you to look for a senior living community?
- Who are you inquiring for?
- What is the current living situation?
- Does anyone help with daily care or tasks?
- What is the biggest challenges?

NOTES: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Motivations- Understanding the Wants & Needs

- What is a typical day like?
- What routines are important to maintain?
- What are the 2 – 3 ways you are hoping that moving into a community will improve things?
- When you think about your \_\_\_\_\_ situation, what are your greatest concerns?
- Is anyone helping with daily chores or daily tasks?
- What are some of your concerns about moving into a senior living community?
- What is most important to you in choosing the right community

NOTES: \_\_\_\_\_  
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## Proceed with the Tour around the community

After showing the prospect around, return back to the original meeting area and continue to review any financial questions as well as setting any follow-up and next steps.

## Financial- Understanding the Budget

There are a few additional funding solutions that may help pay for care.

- Are you familiar with the cost of living in a senior living community?
- Is there a budget range that you want to stay within?
- Does the prospect have a long-term care policy?
- Is the prospect a Veteran or surviving spouse of a Veteran?
  - If a Veteran offer a contact in order to get the process of application started

NOTES: \_\_\_\_\_  
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\_\_\_\_\_

## Closing- Setting the Next Steps

	Date	Time
Resident Assessment		
Re-Tour		
Attend Community Event		
Phone Call Follow Up <i>What is your preferred method of communication (phone, text, email)? Is there a certain time that works best for you to receive phone calls?</i>		
Contract Signing		