

TELE-CHECK SURVEY - EMERITUS - Family

* Critical Question ** Short Version

Greeting / First Impression

Possible 25

Number of Rings

Possible Points

Call was answered after? (choose one) **

- 5 1 or 2 rings
- 2 3 rings
- 1 4 or more rings

Score:
Possible 5

Receptionist

Possible Points

Call was answered with? (choose all that apply) **

- 1 Pleasant and upbeat tone
- 1 Name of Community
- 1 Name of person answering call
- 2 Request for callers name

Score:
Possible 5

Receptionist First Impression

Possible Points

If the call was transferred to or answered directly by the CRD, the call was answered with? (choose all that apply)

- 1 Pleasant and upbeat tone
- 1 Name of Community
- 1 Name of person answering call
- 2 Request for callers name

Score:
Possible 5

Possible Points

If caller was put on hold and/or transferred, how long before the Receptionist or CRD returned? (choose one) **

- 5 Not Put on Hold
- 4 Less than 30 seconds
- 3 More than 30 seconds but less than 60
- 2 More than 60 seconds but less than 90
- 1 More than 90 seconds

Score:
Possible 5

CRD First Impression / Situation

Possible Points

CRD / Receptionist Proceeded to learn more about callers situation by asking: (choose all that apply) **

- 1 What prompted you to call (come in) and learn about us today?
Note to caller: Only give "tip of iceberg" of 911 story
- 1 CRD said "they would be happy to provide information", Do you mind if I ask you some questions?
- 1 What the family member's typical day was like, "tell me a little about family member"
- 1 What is your family members name?
- 1 Where does your family member live?

Score:
Possible 5

TOTAL FIRST IMPRESSION
Possible 25

Comments CRD

Did you feel the CRD was really listening to you? (circle one) Yes Maybe No
Please explain:

Up to this point, what was your first impression of the sales person? (circle one) Positive Neutral Negative
Please explain:

Up to this point, what was your first impression of the community? (circle one) Positive Neutral Negative
Please explain:

Learning and Listening Possible 25

CRD handling of initial direct questions

Possible Points

How did CRD respond to direct questions? (choose one):

- 1 Answered at length and began talking a lot and "laundry listing" features and services
- 2 Answered with short answer and went on with questions
- 3 Asked question about your question and provided short answer
- 5 Asked for more details and encouraged the caller to tell stories and explore his or her own feelings about the stories

Score:
Possible 5

COMMENTS:

Did you feel the Sales Person stayed in control of the conversation by asking questions and listening or did the Sales Person react to questions by talking and sharing too much information? (circle one): Stayed on Track or Shared too much
Please explain:

How did you feel about the way your questions were answered?

Did you feel like the CRD really connected with you and clearly understood what needs would be important to you and your family member and why? (circle one): Yes Not Sure No
Please explain:

Learning about the potential Resident / Family Member Needs

	Did Not	Vague	Did it OK	Did Well	Excellent
Possible Points	1	2	3	4	5
CRD asked what is Important to you and your family member:					
Asked what is important to you about the community you choose for your family member	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asked what is most important to your family member	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asked what is your greatest concern at this time. <i>Note to caller: use 911 story</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CRD asked why that concern was so important	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CRD repeated answer, probed and clarified for most important aspects, asked for more details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Average Score:
Possible 5

	Did Not	Vague	Did it OK	Did Well	Excellent
Possible Points	1	2	3	4	5
CRD reassured, listened and showed empathy:					
Asked questions and really listened	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asked for more details and encouraged caller to share stories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Helped caller explore his or her feelings about stories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Built trust by empathizing and reassuring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seemed to understand and was able to discover what solution might look like	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Average Score:
Possible 5

COMMENTS:

Did you feel like the Sales Person was skilled at drawing your story out? (circle one) Yes No
Please explain:

Did you feel like the sales person was interested in your story? (circle one) Yes No
Please explain:

Did you feel the sales person would be helpful regardless of outcome? (circle one) Yes No
Please explain:

Learning about the family members hopes

	Did Not 1	Vague 2	Did it OK 3	Did Well 4	Excellent 5
<i>Possible Points</i>					
CRD asked about how family members situation is impacting caller.					
Note					
to caller: If asked, share 911 feelings					
How is family member's situation impacting you?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
How is family members situation impacting others?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If we could do one thing to help improve your quality of life, what would it be?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If we could do one thing to help improve the quality of life for your family member what would that be?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
When you find the right situation for you and your family member, what do you hope you/they will be able to do or enjoy?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Average Score:	<input type="text"/>				
	<i>Possible 5</i>				

COMMENTS:

Did you feel like the CRD really connected with you and clearly understood what you and your family were hoping to feel or be able to do once you find the right situation? (circle one) Yes No
Please explain:

Decision Process

Possible Points

Did the CRD ask the following questions about the decision process? (Choose all that apply)

- 1 Asked about all who is involved in the decision
- 1 Asked about how the decision will be made
- 1 Ask about how family member felt about moving
- 1 What is the time frame for the move
- 1 Asked about what other options you are considering

Score:
Possible 5

TOTAL LEARNING AND LISTENING
Possible 25

Telecheck- Presentation Possible 5

Building Value for a Visit

Possible Points

CRD painted a positive and valuable picture of the community's ability to meet the needs of the caller and family member in terms of the callers expressed feelings? (choose one) **

- 1 CRD did not say anything positive about the community
- 2 CRD "laundry listed" features and services with no association to callers expressed needs, feelings and hopes
- 3 CRD explained features with a "general" association to callers expressed needs or hopes
- 4 CRD suggested that based on what was shared it sounded like there was a match between the callers needs and the community
- 5 CRD shared specific examples and or stories to illustrate the match of the caller and community

Score:
Possible 5

COMMENTS:

Did you feel like the CRD made a connection between the streangths of the community and the needs and hopes of the caller and the family member (circle one): Yes No
Please explain:

TOTAL TELE-CHECK PRESENTATION
Possible 5

Setting up the caller for a visit

Note: caller should be prepared to express objection only after asked for a visit and also be prepared to set a visit if the CRD attempts to overcome objection and asks to set an appointment a second time.

Possible Points

CRD encouraged a visit to the community (choose one):

- 5 Encouraged or asked for a visit that day, or as an option the soonest date and explained the benefit
- 4 Encouraged or asked for a visit that day, or as an option the soonest date did not explain the benefit
- 2 Vague invitation to visit "sometime" or "anytime"
- 1 No visit encouraged explained or suggested

Score:
Possible 5

Possible Points

When caller gave objection to coming in for a visit? (choose one)

- 5 CRD listened to and attempted to overcome objection and asked again to encourage a visit for a specific day
- 4 CRD did not listen to or attempt to overcome objection but again encouraged a visit a second time for a specific day
- 3 CRD did not listen to or attempt to overcome objection and then offered to send a brochure
- 2 CRD did not listen to or attempt to overcome objection or encourage a visit or send a brochure
- 1 CRD did not try to schedule a visit at all so caller did not ask for a visit and caller did not have an opportunity to object

Score:
Possible 5

Possible Points

CRD listened to and overcame caller objection in this manner: (choose all that apply)

- 1 *Listened to and restated caller's objection*
- 1 *Asked caller to clarify objection*
- 1 *Asked caller for ideas/ suggested ideas to overcome objection*
- 2 *Asked if caller was satisfied and prepared to take the next step*
- 0 *None of the above*

Score:
Possible 5

Overcoming objections summary/ comments:

Did you feel the sales person heard your objection and earnestly tried to understand what it was that was holding you back from agreeing to a visit. (circle one) Yes No
Please explain:

Possible Points

CRD offered and gave directions (choose one):

- 5 Asked if caller needed directions and gave good clear directions
- 4 Gave clear concise directions without encouragment
- 2 Gave poor directions
- 0 Gave no directions

Score:
Possible 5

TOTAL TELE-CHECK CLOSE
Possible 25

Follow Up for A Visit Possible 25

CRD took a minute to ask for and offer follow up information

CRD asked:

Yes No
5 0

Id like to take a moment and make sure that I have all of your information to make sure you have mine.

Score:
Possible 5

Explained how he/she could help the process.

Score:
Possible 5

	Name	Address	Phone
<i>Possible Points</i>	1	2	2

Potential residents information

Callers Information

Other information

Shared CRD's information with caller

Average Score:
Possible 5

Possible Points

Based on caller's conversion, what was the general feeling about this CRD's ability to connect the caller's needs to the community:

- 1 No connection
- 2 Not quite a connection
- 3 Not sure if there was a connection
- 4 Yes there was a connection
- 5 Deffinitely a connection and a match

Score:
Possible 5

Comments please explain:

Possible
Points

Would caller actually visit?

- | | | |
|---|-----------------------|--------------------------|
| 1 | <i>Definitely Not</i> | <input type="checkbox"/> |
| 2 | <i>Probably Not</i> | <input type="checkbox"/> |
| 3 | <i>Neutral</i> | <input type="checkbox"/> |
| 4 | <i>Probably Yes</i> | <input type="checkbox"/> |
| 5 | <i>Definitely Yes</i> | <input type="checkbox"/> |

TOTAL FOLLOW UP
Possible 25

Why or why not would caller visit? Please explain:

Total Possible:

<i>First Impression</i>	25
<i>Learning and Listening</i>	25
<i>Telecheck Presentation</i>	5
<i>Telecheck Close</i>	20
<i>Follow Up for A Visit</i>	25
TOTAL:	100