

# IN PERSON SURVEY - VALUEPATH

## 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 Sales Person, 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

### Hold Time

Possible Points

If caller was put on hold and/or transferred, how long before the Receptionist or Sales Person 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:

**Sales Person First Impression / Situation**

Possible Points

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

- 1 What were you hoping to accomplish on your call today?
- 1 Sales Person repeated answer and said "I would be happy to help you with your request, do you mind if I ask you a question?"
- 1 Sales Person asked "what is your (callers) situation?"
- 1 Sales Person repeated answer and asked how caller "felt" about situation shared.
- 1 Sales Person listened to and repeated what caller shared and showed empathy for their situation and feelings. "I understand how you could feel the way you do".

Score:   
Possible 5

**TOTAL FIRST IMPRESSION**   
Possible 25

**Comments Sales Person**

Did you feel the Sales Person 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:

**Building Relationship Possible 25**

**Sales Person handling of direct questions**

Possible Points

**How did Sales Person 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 some questions about your question to clarify and understand your feelings.   
*Note to caller: Be prepared to answer feelings questions*
- 5 Sales Person asked if they could address your question at later time in process. "In order to help you with what you shared, do you mind if I ask you a few more questions?"

Score:   
Possible 5

**COMMENTS:**

Did you feel the Sales Person really listened to the conversation by asking questions and empathetically 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 and statements were answered?

Did you feel like the sales person stayed on your agenda, and clearly understood what your situation was and how you felt?  
(circle one): Yes Not Sure No

Please explain:

## Building Rapport / Relationship

### Learning about the potential Resident / Family Member Needs

*Possible Points* **Sales Person asked what is Important to you and your family member:**

- |   |   |                          |
|---|---|--------------------------|
| 1 | Asked about who else was included in the decision process   | <input type="checkbox"/> |
| 1 | Asked who had the responsibility to sort through the details and make a recommendation  | <input type="checkbox"/> |
| 1 | Asked how the decision process was working for them   | <input type="checkbox"/> |
| 1 | Sales Person repeated what was shared as each question was answered and showed empathy and or understanding for callers situation | <input type="checkbox"/> |

**Total Score:**   
*Possible 5*

*Note to caller: Sales Person has some latitude with this next question*

*Possible Points* **Sales Person asked a second question and attempted to build relationship with caller**

- |   |   |                          |
|---|---|--------------------------|
| 5 | You had mentioned something earlier, "a fact or story point revealed in callers situation story"              | <input type="checkbox"/> |
| 5 | How are you balancing "the situation shared" with your personal life?   | <input type="checkbox"/> |
| 5 | What do you do or how do you spend your time when you are not caring for or looking after your family member? | <input type="checkbox"/> |
| 5 | Asked something about caller personally such as, what they do for work, what they do for fun?                 | <input type="checkbox"/> |
| 0 | Did not ask a second question in this step and before the next section.                                       | <input type="checkbox"/> |

**Total Score:**   
*Possible 5*

*Possible Points* **Sales Person Learned about caller on a personal level and shared personal values that showed interest in understanding of an actual ValueMatch with caller**

- |   |  |                          |
|---|--|--------------------------|
| 1 | Sales Person asked caller to share more details about the situation caller gave to previous question | <input type="checkbox"/> |
|   | "when you said _____ what did you mean?"   |                          |
|   | "You mentioned _____ please share more about that"   |                          |

2 Sales Person listened to and repeated answer given and asked how caller felt about what was shared or why it was so important to caller

3 Sales Person shared an interest in, appreciation for or attempted to better understand the values "feelings" caller shared.

0 Sales Person did not seem to really hear or listen to what caller shared / did not ask initial question

**Total Score:**   
*Possible 5*

<i>Possible Points</i>	<b>Did Not</b> 1	<b>Vague</b> 2	<b>Did it OK</b> 3	<b>Did Well</b> 4	<b>Excellent</b> 5
<b>Sales Person reassured, listened and showed empathy:</b>					
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:

**Discovering Callers Urgency (911 story)**

<i>Possible Points</i>	<b>Did Not</b> 1	<b>Vague</b> 2	<b>Did it OK</b> 3	<b>Did Well</b> 4	<b>Excellent</b> 5
<b>Sales Person asked about how long situation shared earlier was going on and attempted to discover the real issues (feelings) easing the caller to be more interested in shopping for, looking more now?</b>					
Sales Person asked how long has situation described earlier been going on? <i>Note to shopper: be prepared to slowly share more and more details of the initial tip of 911 story shared earlier.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Story - if asked</i>					
<i>Feelings - if asked</i>					
<i>Solution in terms of feelings - if asked</i>					

Sales Person asked what has happened recently that has you shopping or looking more seriously now?

Sales Person repeated what was shared and then probed for them using some of the specific words caller used

*Note to caller: use adjectives that give hints of "more to the story"*

Sales Person repeated what was shared and asked "when you say adjective or key word" what do you mean? Can you share more about that?

Sales Person repeated what caller shared and asked how caller "felt" asked for feelings about what was shared. *Note to caller: be prepared to share feelings*

Sales Person repeated feelings shared and asked caller to describe the desired solution in terms of how caller wants to feel when they find what they are looking for. "what will the solution feel like when you have found it or after you make the right decision?"

*Note to caller: be prepared to describe the feelings you are looking for, ex: peace of mind, security, safely, family, friends, connections.*

Average Score:   
*Possible 5*

**COMMENTS:**

Did you feel like the Sales Person 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:

**In Person- Presentation (You have found the right place) Possible 5**

**Building Value for a Visit**

**Sales Person 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)**

*Possible Points*  
**\*\***

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

Score:   
*Possible 5*

**COMMENTS:**

Did you feel like the Sales Person made a connection between the strengths of the community and the needs and hopes of the caller and the family member (circle one): Yes No

Please explain:

**TOTAL In Person PRESENTATION**

  
Possible 5

**In Person Relationship - Close**

**Possible 20**

**Setting up visitor for building value in concept**

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

Possible Points

**Sales Person asked the following (choose one):**

If you don't mind I would like to ask you a few more questions about what your family members' needs, interest, lifestyle is to better plan our visit in our community

5

Asked about what family members health care situation was at this time

4

Asked about what support services are being provided to family member at this time

2

Asked what family member likes to do or would like to be able to do

1

Did not ask

0

Score:

Possible 5

**Sales Person listened to answers for needs and hopes and lifestyle questions and asked to disclose most important aspects and feelings or values in areas to plan appropriate valuable visit "tour"**

Possible Points

Sales Person asked visitor to prioritize most important items showed

5

Sales Person asked to clarify most important items "what do you mean by that"

4

Sales Person asked "why is what you shared so important"?

3

Sales Person shared specific examples and/or stories to illustrate the match of the visitors (family member) values with specific aspects or value of comments

2

Sales Person confirmed that important aspects should be included in visit plan

1

Sales Person wrapped up discussing a visit plan and with family member that this is what they would like to do

Score:

Possible 5

Possible Points

**Visit Presentation**

Sales Person took the visitor (family member or possible resident) model apartment or actual apartment

1

Repeated values shared by visitor earlier and continued to ask questions and probed for interest on solution

1

Sales Person asked more questions and listened for this talk

1

2 Sales Person pointed out current things that previously to values expressed earlier and confirmed interest in with visitor

0 Sales Person asked if visitor "loved this particular model for a model apartment

Sales Person asked the visitor if they loved this and had all questions answered they would be welcomed to move forward and leave a deposit today for a specific apartment

Score:   
*Possible 5*

**Overcoming objections summary/ comments:**

Did Sales Person listen more than talk during presentation: Yes No  
Please explain:

Did the Sales Person tailor visit and presentation of each area to values expressed by visitor? Yes No  
Please explain:

Did you feel that Sales Person asked you to make a decision in a careful way giving you an opportunity to express questions or  
Please explain:

How do you feel about Sales Person approach to personalize and attempt to ask you to make a move? Smooth Awkward  
and Not Sure  
Please explain:





