

House Visit

House Name:

Date:

SALES EVALUATION

1 - Complete Mentoring Sales Calls

House Position

Referral Source Name

Referral Source Title

Referral Organization

Sales Call Evaluation Score Rate on a scale of 0 - 11

4 - Make Contact with preferred provider for strategic discussion (RDO minimum 2, RDSM minimum 3)

House Position

Resident Director

Sales Manager

Wellness Director

Other

Referral Source Name

Referral Source Title

Referral Organization

Sales Call Evaluation 0 - 11

7 - Stand Up Meeting

Did you attend stand up meeting - Y/N

8 - List hot leads and strategies to move the inquiry in this week

Lead First Name

Lead Last Name

Strategy 1

Strategy 2

10 - Personally call 5 cold/warm leads and update STAR

Cold/Warm Lead First Name

Cold/Warm Lead Last Name

12 - Tour a competitor

Competitor

Name of person who provided tour

Title of person who provided tour

Would you consider hiring this person

13 - Conduct a professional referral source telephone mystery shop with the house sales manager or residence director present during the call

Referral Source Name

Referral Source Title

Referral Source Organization

19 - Conduct 1 home visit to warm lead

Warm Lead - First name

Warm Lead - Last name

14 - Make a telephone contact with someone who has taken a recent tour and has not chosen ALC or has not made a choice with a residence

Inquiry Name - First Name

Inquiry Name - Last name

Person Contacted

18 - Narrative:

Discuss topics not covered by the above questions:

25 - Employee Appearance

Have you reviewed all on site employees to ensure proper uniform, no visible tattoos, or inappropriate piercings and conducted appropriate follow up prior to leaving for the day, Y/N