

How well do we know this prospect? What more do we want to know?

LIFE STORY

- Have you always lived in [current city, town, neighborhood]? Where are you from? What brought you here?
- What did you do for a living? Did you always know that's what you wanted to do when you were growing up?
- How did you meet your spouse? How long have you been married?
- What was the happiest time of your life?
- What was the most challenging time of your life?
- What was the biggest decision you ever made?

LEGACY & VALUES

- What are the biggest life lessons you've learned?
- What advice would you have for a younger generation?
- What are you most thankful for?
- What do you value most in life?
- What are the proudest moments of your life?
- What were your family's greatest strengths?

TYPICAL DAY

- What is a typical day like for you?
- What do you do for... meals, shopping, cleaning, laundry, friends, family, faith, fun?
- What is your favorite time of day? Why?
- What is your least favorite time of day? Why?
- What do you like to watch on TV?
- Where do you go during the day?

FINANCIAL

- How have you prepared financially for this chapter of life?
- How do you feel about your finances?
- Do you have the guidance of a financial advisor to understand your options?
- Do you feel senior living is affordable?
- What was the biggest purchase you've ever made? How did you approach that decision?

HEALTH

- Are health issues getting in the way of the things you like to do? What?
- Do you have the guidance of a physician(s) to help you manage those issues? Who?
- How do you feel about your health? Are you concerned?
- You mentioned (health concern), what problems does that cause in your daily life?
- What is it like to get older?

INFLUENCERS

- Who do you go to when you need help?
- Whose advice do you rely on?
- Who do you talk to most often?
- Tell me about your kids...

MOTIVATORS

- Why would you even consider a change?
- What keeps you up at night? Do you think these issues will get better with time?
- What do you think will happen if you don't make any changes?

OBJECTIONS

- What concerns you the most about making a change?
- What do you think or imagine about living in a senior living community?
- Are you worried about... losing your independence, living with old people, all your stuff, finances?

PREFERENCES

- If you were ready to choose a place to live, what would be most important to you?
- Where else have you looked? What did you like?
- How do you envision your next chapter of life?

Questions to help this prospect move forward in their stage of readiness

DENIAL STAGE (mermaid)

- Tell me about your home. How long have you been there?
- What do you enjoy most about your home?
- What do you like most about your current lifestyle?
- It sounds like your home is wonderful. Why would you even consider ever moving?
- What is a typical day like for you?
- What is your favorite time of day? What is your least favorite time of day? Why
- Do you cook? Is food important? Favorite recipes?
- What are your interests or hobbies? What does your social life look like?

THINKING STAGE (alligators)

- What worries or concerns you about your current situation?
- What problems get in the way of the things you enjoy?
- Do you think these problems you're having will get better with time?
- What do you think will happen if you don't change anything?
- Why might you consider a move? Are you sure you can't stay at home?
- What options have you considered that would help you stay at home?
- Do your children think you should move? Is there a family member that might move in with you?
- Are you as happy living here now as you were when you first moved?

PLANNING STAGE (risks)

- What worries you most about making a change?
- What concerns you the most about making a move?
- When was the last time you made a big change? What was that like?
- When is the best time to move? Why then and not even later?
- Are you worried about what to do with your things?
- How do you feel about living with people your age? How do you feel you would fit in?
- Are you concerned about losing independence? In what ways?
- Do you feel you can afford it?
- Would your children visit you here?

ACTION STAGE (treasure)

- What is most important to you in choosing a community?
- Where else have you looked? What did you like about it?
- Would you like to meet/talk to someone on our staff?
- Would you like to talk to other adult children, residents, or influencers before you decide?
- How do you imagine your life would be here?
- Would it be beneficial if we did a furniture plan in case you choose to move here?
- Can I create a comparison worksheet for you to use in your search?