

Along with Discovery and Creative Follow-Up, Home Visits are some of the most important tools sales counselors can use for promoting advances with prospective residents.

Why are Home Visits so effective?

Let's look at our prospects and the culture they come from. Back in their day, doctors would come to their home and milk would be delivered to their door. Why shouldn't sales counselors do the same?

Don't be intimidated going on their turf. This is an opportunity to learn more about the prospect and talk to them in an environment that they are comfortable in. Don't forget to state your intentions from the start, saying something to the effect of "I am here to learn more about your situation and to see if you could benefit from a move to our community."

Difference in Selling Attitude

- **Product Centered:** Make phone calls to get the prospect to where you are. "Come tour!"
- **Prospect Centered:** Go to the prospect. "I want to understand your situation even if you never move in. Let me come to where you are."

How to prepare for a Home Visit

- **Getting the appointment:** Offer to bring a meal, pet treats or some other personalized gift.
- **Advanced preparation:** Use case studies and develop an action plan before the visit.

Types of Home Visits

- **Scheduled visits:** Make an arranged meeting whether the outcome is selling or non-selling (assess the home, do a safety check, create a moving plan, do biographic and other Discovery, get more information or clarification).
- **Drop-ins:** The prospect may be hiding or avoiding you, but they need you. Bring them a gift and tell them you aren't there to sell but instead to help.
- **First call drop-Off:** Hand deliver information about the community or other individualized resources to start building trust and gaining Discovery.
- **Adult Child drop-off:** Hand deliver relevant info/book/other resources to help them work with the prospect in getting help or making a decision.



Two visits are better than one

- Multiple visits show that you care about the prospect despite not getting a commitment the first time around.
- More frequent visits give you better chances to listen and acknowledge assumptions, objections or ambivalence.
- With multiple counselors visiting, the prospect now has two points of contact and either one can follow up.

During the Visit

- State your intentions from the start.
- Validate their home. “What a lovely home you have. Where did you get that item on your shelf?”
- Offer to create a photo or video scrapbook to memorialize their home, furnishings and mementos.
- Offer to help the prospect deal with the mechanics of selling the home, deciding what to take and what to do with the rest of their belongings, and creating a moving plan.
- Look at pictures, art or anything else to evoke stories
- Ask questions like “Why not stay?”
- Be prepared for some emotional moments!
- See if you can take a picture of them around their home
- Try to get a commitment for the next step
- Immediately after the visit, make a detailed journal entry of your observations, critical conversation topics and action plan options
- Always send a thank-you note and personalized, Creative Follow-Up

Questions about Home Visits

- **How long should I visit for?** These visits usually last for about an hour, but take your cues from the prospect. They probably enjoy the company, especially if they live alone. Ask for a tour around the house and ask a lot of questions. Make sure they are relaxed and comfortable before having important conversations.
- **What should I bring?** Apart from Creative Follow-Up, you could always bring food if you are visiting during mealtime or some other snack the prospect can enjoy later. Be sure to check your Discovery for a favorite food or dish. If they have a dog, bring treats. This is your opportunity to show that you've been listening to them, so be thoughtful!
- **What if they don't want me to visit them?** You can always do a drop-off or invite them to visit you.
- **When should I plan a home visit?** Plan a home visit following an initial call, a tour or when you want to deliver Creative Follow-Up. Do as many home visits as you feel will help advance your prospect.

