Consultants For Long Term Care, Inc. (CLTC)

Senior Housing Mystery Shop Program

Training Presentation For Mystery Shoppers
Overview Of CLTC, Inc.

• Incorporated in 1998 and based in the Louisville, Kentucky area

• We started mystery shopping senior housing communities in 2002, and have facilitated over 6,000 shops across the country.
Your Contact Professional At CLTC

Your contact professional for this shop, Monday through Friday, 9:00 a.m. to 5:00 p.m. Eastern Time:

Lisa Spears
502-439-0035
lisa@cltcinc.com
Getting Started

• In addition to viewing this video, you’ll also need to look over the online report that you'll be filling out, as well as the sample report that was attached to your confirmation email, which will show you what we expect in terms of narrative.

• This presentation will also be available in written (pdf) form, in the Training Materials document linked on the report page.
Making Your Telephone Call & Scheduling The Visit

• After reviewing the training materials, your next step is to call the senior housing facility. The phone number is listed in the report itself.

• The call and scheduled visit must both occur between 9:00 and 5:00 on a non-holiday weekday.

• If the facility representative suggests a 4:15 or 4:30 visit during the call, and indicates that he/she will be providing the tour, it is acceptable for the tour to conclude after 5:00.
Tour Invitation Response

• If the receptionist offers you a tour before transferring you to a director, please say that you would like to schedule a tour, but you’d like to speak to someone to get some information about the facility first.

• If no one else is available, the receptionist might provide the information about the facility herself, which is okay.
Sharing Your Contact Information

• Unless instructed otherwise, please use your real name and contact information when dealing with the facility personnel.
• We recommend that you share only the first name of the loved one in your scenario, for confidentiality purposes.
Explaining Your Proximity To The Facility

• Since you will probably be asked for your address during the call, if you live more than 30 minutes from the facility, you should be prepared to explain why you are looking into this location.

• If you are asked about this, you should share that your loved one lives closer to the facility and wants to remain in the area, or perhaps she has another family member in the vicinity.
Provide Only One Telephone Number

• Please give out only one phone number, mailing address and email address, so that you will have other information to use if you are asked to shop another facility for us in the future.

• Keep track of all the contact information you provide in this shop, so that you do not accidentally duplicate it in future shops (if applicable).

• You must share with the facility representative all of the contact information she asks for, so be sure to have all of that information ready before you make your call.
How Did You Hear About Them?

• You will probably be asked how you heard about this senior facility. You can explain that you went to the company’s website and checked out the page about this location. You should actually do this ahead of time if you plan to say that. The senior facility website (search for the community at atriaseniorliving.com) is also where you can find the address of the facility you’ll be visiting.
Your Scenario

• Refer to your confirmation email or to the instructions at the top of your report to see the scenario you should use for this shop. Your family member should be in his or her 80’s. Please follow the prescribed scenario closely.

• If you are asked, please say that your loved one does not know that you are looking into senior housing, so the representative does not wonder why you are not bringing him or her with you.
Don’t Initiate Request For Tour

• When you make your phone call, do NOT volunteer that you are calling to schedule a tour. You need to let the facility representative invite you in, so do not bring up the tour at any point.

• When you are asked for the reason for your call, you can say that you are beginning to look into senior housing on behalf of a family member.
Best Times To Schedule Tour

• If you are invited to lunch as part of the tour, please decline that invitation. You can say that you won't have enough time for that, or that you want to come in at a different time of day.
• Mid-morning and mid-afternoon are best for the tours, because activities might be going on then that you could observe and report on.
• Be prepared to schedule an appointment during the call; check your calendar first and know your availability. Be sure to set a firm appointment time.
Tour Guide

• You do not have to tour with the same person with whom you speak during the call, unless otherwise instructed by CLTC.

• Your call and visit do not have to be made on the same day.
Getting Information During Call

You must speak with someone about the community before you go in. If a salesperson is not available, the receptionist might answer your questions and provide information herself, but you may **not** just schedule an appointment and go in without speaking to someone. This might require more than one call attempt.
If You Are Not Invited In

• If the representative asks if you would like to receive some information in the mail or by email and does not mention a tour at that point, you should agree to receive the materials. Then wait and see if a tour invitation follows. Do NOT bring up a tour yourself, under any circumstances.

• If a tour does not come up during the phone call, please explain that in the narrative section of the phone report. Then call or email me, Lisa Spears, to see what your next steps will be.
Filling Out The Phone Section

• Immediately after you get off your call, you will need to fill out the phone section of the online report.
• Included in that part of the report are some Yes/No questions and a Notes section. There will be prompts within the Notes section that explain what kind of narrative to provide.
Filling Out and Saving Your Phone Section

• The narrative boxes will automatically adjust in size to accommodate your narratives.
• In your report, please refer to the associates with whom you speak during the call and visit by their first names, not by their titles or by “Ms. Smith,” e.g.
• After you've finished filling out the phone section of the report, click on the Save button at the bottom of that section to retain your work.
Prospective Resident’s Name

At the top of the report you will see a field asking for the name of the prospective resident, i.e., your family member. Please fill that space in with your family member's name only if you are asked for that person's name during the shop.

If you're not asked for the name during either the call or the visit, please put 'Not Asked' in that space.
Phone Report Timing

You must fill out the phone report the same day that you make your phone call, and before you go in for your visit. Use the Save button that is located directly under the phone report to save your work.
On-site Appearance and Comportment

• Business or business-casual dress is required for your on-site visit. You are portraying a family member of someone who can afford to live in a fairly high-end facility, so you need to look the part.
• Please be very courteous and professional at all times.
• Regardless of any experience you have with senior facilities, you should present yourself as someone who has little to no knowledge of this kind of living arrangement.
Length Of Your On-site Visit

• When you go in for your visit, casually mention to your tour guide that you have about an hour to spend.

• Please be flexible about the time, though. If your tour guide asks you to come back and sit down with her after the tour to discuss things, you must agree to do so, even if it makes the tour last longer than an hour.
Observing Names During On-site Visit

• You will need to get the names of two people during your visit – the person who greets you (probably a receptionist) and the tour guide.
• Discreetly see if the greeter is wearing a name badge, or if she introduces herself by name.
• Please record the first and last name of the tour guide in the field where you are asked for her name.
On-site Visit Pointers

• These facilities are fairly expensive. Please do not express any “sticker shock” when you are told about the prices. You are portraying the family member of someone who can afford to live at this kind of facility.

• Pay close attention to how much time the tour guide spends on trying to understand your needs, versus those of your loved one. You will be asked about this in the report.
Literature To Take Home

• Your tour guide will give you some literature about the facility to take home.
• Do not write anything on those materials. You will be mailing them to CLTC.
• If the tour guide writes something on the materials, or if they're already written on when you receive them, when you get home, please stick a post-it on every page that has markings on it and explain who made those notations.
Recommended Next Steps

Pay very close attention to the tour guide's closing remarks so that you can report on those accurately when you get back. What 'next step(s)' did the tour guide suggest?

What next step(s) did your tour guide recommend and then secure your permission? Please select all that apply, and if no consensus was reached, then only select None. (CF#7)

- Select An Apartment
- Follow-Up Tour Or Assessment
- Come Back For Meal
- Activity
- None

- Phone Call - Community Will Call You
- Phone Call - You Call Community With Questions
- Respite
- Deposit
Bringing Up Your Objection

• Please refer to your confirmation email or report form to see what you are supposed to bring up as an objection. This is a required step. You should bring up the objection at an appropriate time during the on-site visit, not during the phone call.

• There is a question at the end of the Overall Rating section of the on-site report about how your tour guide responded to the objection.
Next Steps and Follow-up Call

• You should be open to whatever next steps your tour guide recommends. Put yourself in the shoes of someone who actually has a family member in this situation and would be very eager to learn what the guide recommends as the best next steps in the process. Make sure that you record all of her suggestions in your report.

• Please do not say anything during the closing that will prevent your tour guide from calling you the next day to follow up, such as that you will be going out of town or that you would rather that she not contact you so soon. We do not want to interfere with that process.
Food Item

• If you are offered a thank-you gift of a food item to take home with you, such as a box of cookies, you **must** accept it, take it home and sample it, so that you can provide feedback about whether you enjoyed it.

• If you’re allergic to any ingredients, or can’t eat the food item for another reason (which you should explain in your report), please have a family member or neighbor sample it and give us his or her feedback.
Please fill out the on-site portion of the report as soon as possible when you get home. The main narrative portion of the on-site report is found in the Overall Rating section. There will be prompts included in the narrative box so that you will know what kind of information to provide.

(Start this narrative with a general statement about whether you would be happy with your loved one living in this community. Then get specific about why or why not. Please provide at least a brief paragraph about each of the following areas.)

(Activity program - did the activities appear interesting? Was there a good variety? Was there a good number of activities offered each day?)

(Staff - were the staff people friendly to you? Did they seem caring and respectful to the seniors in the community?)
Amount & Type Of Narrative Detail

• Do not provide a step-by-step description of what happened during the tour, unless otherwise requested by CLTC. Simply address the questions that are included in the narrative box.

• Do not include direct quotes in any of the narratives.
Not Just the Facts!

• You will notice when looking at the questions provided in the report that we are very interested in your personal impressions of the facility. We don’t just want to know how many activities are provided each day; we also want to know if you think that the facility provides a good amount of activities, for example. Your opinion matters!
Finishing Your Report

When you’ve finished filling out your report, click on the Check Spelling button in the lower right, then make all necessary corrections.
Optional/Additional Questions

If the Optional/Additional Questions at the bottom of the report are blank, please disregard them.
Save Your Online Work

- Please save your work at least every 20 minutes and do not leave the report open if you walk away for more than a few minutes. You could lose all of your information that way.

- Please use the Save button at the bottom of the page when saving your on-site report information, since it works differently from the Save button under the phone report.

- Do not have the report open in more than one Window or device at the same time. That will cause you to lose your all of your information.
We recommend saving all large narratives to a Word document so that you don’t have to re-create them if you should encounter a saving issue in the report.
24-Hour Follow-Up Question

• You will need to go back into the report the day after your visit to answer a question in the Closing section about the follow-up call.
• Please allow until the end of the next day for that call before you answer the question, even if that exceeds the 24-hour time frame.
• You don’t have to answer the follow-up call; you can let it go to voicemail, but be sure to listen to your messages so that you know who the call was from.

Within 24 hours after your tour, did you receive a follow-up call from your tour guide or another member of the community? (CF#10)

Yes  No
Submitting Your Report

• If your visit is on a Friday, you will need to go into the report on Saturday and answer the question about the call.

• After you answer that question, you may submit the report, by clicking on the Finish button at the bottom of the page.

• Once you click the Finish button, you will no longer be able to access the report.
Deadline for Report

• Your report is due the evening of the day following your visit, after you have answered the question about the follow-up.

• This is ample time to complete the on-site section of the report, which should take about an hour to fill out.
Sending In Your Materials

• Within one day of your visit, you will need to mail in the literature you received from your tour guide, in a flat-rate priority mail envelope, for which you will be reimbursed.
• You do not need to provide a receipt.
• You do not need to send any gifts you receive from the facility personnel.
• Please mail your materials to: Lisa Spears, CLTC, 5515 Baywood Drive, Louisville, KY, 40241.
Sending In Your Materials, Cont.

• Please include your full, real name and address on the envelope, and please write very neatly or use a mailing label (preferred), so that CLTC will know where to send your payment.
• We recommend that you hang onto your materials until after you fill out your report, in case you need to refer to them for any details about the shop.
• This is a required step; your shop will not be accepted unless materials are received in a timely manner.
If You Picked Up Promotional Materials

• There is a question in the report about whether you picked up any promotional materials on your own, besides what your tour guide gave you.

• You are not required to pick up any extra materials, but if you do, please send them in with the other materials, and indicate in the report what you picked up on your own.

Did you pick up any promotional materials, flyers, cards or brochures?

☐ Yes ☑ No
CLTC’s Payment Policy

• We pay by check, normally during the first two weeks of the month following your shop.

• Even if your shop is accepted, payment could be reduced if all instructions are not followed and deadlines are not met, unless there are extenuating circumstances which you explain in writing and we approve.
CLTC Follow-Up

• Please remain accessible by email after you submit your report, in case we have any questions about it.

• Even after CLTC’s final editing is done, a question might arise when our client sends the report to the facility personnel, so please continue to check for emails from CLTC.
Senior Facility Follow-up

- In addition to calling the day after your visit, the senior facility staff might follow up with you a week or two later to see if you’ve made any decisions. At that point, you may get some closure by saying that you have made other arrangements, such as that Mom is going to move in with you for a while.
That’s All!

Thanks again, and enjoy your shop!