

# Cottage Tour & Phone Report



Tour Location: \_\_\_\_\_

Date: \_\_\_\_/\_\_\_\_/\_\_\_\_ Time: \_\_\_\_\_ AM - PM

How did the visitor or caller hear about The Cottages? \_\_\_\_\_

Tour/phone call handled by: \_\_\_\_\_

Lead entered into Blue Step by: \_\_\_\_\_ Date: \_\_\_\_\_

**\*\*Keep a copy of this tour report for your file and scan a copy to Marketing@thecottages.biz**

## Potential Resident Information

Resident Name: \_\_\_\_\_ Age: \_\_\_\_\_  
*Last First Mr./Mrs./Ms.*

Notes: \_\_\_\_\_  
\_\_\_\_\_

## Responsible Party Information

Name: \_\_\_\_\_

Relationship: \_\_\_\_\_ Phone: (     ) \_\_\_\_\_

Email address: \_\_\_\_\_ Phone: (     ) \_\_\_\_\_

Address: \_\_\_\_\_  
*Street Address Suite/Apt #*

*City State ZIP Code*

Permission to add to our mailing & email lists? YES ☐ NO ☐

Date needed: \_\_\_\_\_ Estimated Care Level: \_\_\_\_\_

## SPECIAL NEEDS & NOTES

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_