

# **Learning and Lifestyle New Customer Meeting/ Site Tour Discussion Guide**

# Congratulations!

You have a new prospective customer who is interested in attending your learning and lifestyle centre. Prior to signing up as a customer with Endeavour Foundation, most families and individuals choose to drop in and see our services for themselves, as well as meet our staff and other customers.

The following guide is designed to offer you some things to consider when preparing for a prospective customer to visit your service and to assist you with responding to some frequently asked questions.

*We'd love your feedback! If you would like to submit suggestions for improvements to this guide, or you have been asked a particularly curly question, please let us know at [marketbrief@endeavour.com.au](mailto:marketbrief@endeavour.com.au).*

## A customer's decision making process

The decision to participate in a new service could be instigated by the prospective customer themselves, a family member or a key influencer like a teacher or NDIS support coordinator. There are lots of factors that are taken into consideration by the customer and family member when assessing whether a service may be a good fit for the customer. These may include:

- The first impression made by our support workers, including friendliness, caring demeanour and demonstration of skills in working to support customers;
- The look and feel of the site including break out areas and outdoor spaces;
- Site accessibility, drop-off zones and parking;
- Transport options to the service;
- Other customers at the site and the number of customers;
- Program calendar of activities;
- Opportunities for social interaction and development; and
- Quality assurance and safety procedures in place to protect the customer.

In addition they will also be supported by their LAC, Support Coordinator or Endeavour Foundation's NDIS team to understand how our services will fit with their NDIS goals and available funding.

## Preparing your site

There's an anecdote about a new staff member who went for an interview at a bank branch. While he was waiting for his interview he noticed that all the employees were walking around or stepping over an orange electrical cord that was on the floor of the reception area. No one moved the cord or questioned why it was there, it had become habit for the staff at the bank branch.

A prospective customer and their family who are visiting your site will view the environment with fresh eyes and notice all of the details, including the orange electrical cord! They're using this information to determine whether it's the right choice and it's important to remember this as you prepare your site for a prospective customer visit. Details matter when a prospective customer is assessing Endeavour Foundation for the first time and making a big decision about whether they, or their loved one, will spend a lot of time at that service.

### **Suggestions for preparing your site environment for a visit:**

- Remove unused or damaged sports equipment, outdoor furniture and other items from outdoor areas.
- Assess the walls for damaged posters and artwork, bluetac residue and old Endeavour Foundation signs/posters. If in doubt, take it down.
- Remove general clutter and equipment from tables and surfaces.
- Turn on all tech equipment and ensure it's working correctly. Prospective customers may want to try or have a demonstration of Virtual Reality.
- Print out copies of your site's Connect program calendar and most recent Connect Newsletter.

### **Preparing your customers for a new visitor:**

- Let your customers know that you'll have a new visitor at the site today.
- Ask customers to make the new visitor feel welcome by introducing themselves.

### **Preparing your staff for a new visitor:**

- Let your staff know that you'll have a new prospective customer onsite and their name.
- Ask staff to introduce themselves to the prospective customer and take a minute or two to chat with them and their families.
- Ask staff who are facilitating an activity or program to take a minute to explain the activity and the learning outcomes to the prospective customer and their family.

### **The site tour**

Meet the prospective customers at the front door at the organised time for the meeting. Take the time to walk the family through each room in the site and explain what activities and programs are conducted at the site and through community participation programs.

Some of the key components to focus on:

- Kitchen = cooking programs and independent living skills
- Computer room = investment into structured and blended learning opportunities including pedestrian safety, public transport and work skills.
- Outdoor space = gardening, arts activities.
- Community participation = shopping, volunteering, exercise.

Once you have walked through the space with the family, find a quiet area to sit with the family and perhaps offer them a tea/coffee/water. Use this time to have a relaxed conversation with the customer and family to get to know them a little better. You can also give the customer a printed copy of your site's Connect program calendar and Connect Newsletter and explain how the Connect app can be used by all parties.

## Good questions to ask

A number of members of Service Delivery have contributed to the production of this resource and below is a list of their recommended questions to ask during a prospect's first visit to our sites.

You have already received a brief about the potential customer from the Customer Service team, so make sure you have read that thoroughly so the family does not have to repeat all of the information they have already shared in their initial contact with Endeavour Foundation.

Talk directly to the individual with disability and allow them time to respond. From our first interaction with the potential customer, we need to demonstrate our customer centric focus to service delivery.

1. "What do you like to do?" Asking this question up front will help you structure the tour to areas of interest. If a customer says "art" for example, then ask a follow up question like "what kind of art do you enjoy? Sculpture? Illustration? Painting?" This helps to illustrate to the family that the programs we run at our site are not token gestures and have strong educational merit behind them. You can respond to this question with some information like "we run a good art education program here. It's an individual-led experience and we look at both theory and practical elements to composition and design. We will run an art exhibition at the end of each 12 week course."
2. "Do you use the computer?" So many of our customers like all things tech. If they indicate they are interested in technology, ask follow up questions to understand the programs that they use and what they enjoy about technology. Use this line of questioning to talk about the technology opportunities at your site.
3. "What do you like to cook and eat?" Life skills is such a hot-button for families and it's a perfect way to discuss the end-to-end life skills program offering. Use real life examples like "yesterday our customers made lunch for everyone. They spent some time deciding on the recipe in the morning and then they wrote lists and went to the shops to purchase the ingredients. They cooked a beautiful pasta bake and even did the clean-up."
4. "Do you like to be in a group of people or do you prefer a smaller/quieter environment?" This is a key question to help gauge an individual's level of comfort to be in a group environment and any sensitivities to noise and other stimuli. This could be an opportunity to showcase smaller break-out areas and outdoor spaces.
5. "Do you have any particular preferences or dislikes that you'd like to tell me about?" This a friendly way to learn more about the customer and to discuss how we can best accommodate them as an individual within our services. You may also uncover some behaviour or preference concerns that perhaps will require additional support or a customer referral to another service provider. A good follow on question to this one is "is there anything in particular we can do to offer you support while you're in our service?"

6. “Do you have any worries about attending a day service?” Change can be a scary thing for us all. This question can help you uncover and allay the fears of the customer and family.
7. “What are you hoping to achieve by attending the service?” Whilst you will already have information about the customer and their NDIS goals prior to the site tour, but often times an individual’s goals will be quite broad. A customer may have a specific goal like they’d like to be able to handle money or learn how to cook. Prepare for the customer and the customer’s family to have differing opinions on what their goals for attending a learning and lifestyle service! One example that was provided during the creation of this guide was from a SOM was where the customer, a young male, wanted to attend the day service in order to “meet a girlfriend” whilst the mother wanted her son to learn to independent life-skills and to build his social confidence.
8. “If you are interested in coming into our service, is there anything we could do to make the transition easier?” Again this type of question will enable you to get to know the individual and their behaviors. If a customer has indicated that they’re interested and they are a good fit for your service, you can offer a free trial day where they can come in for a morning or the whole day to try out the environment and programs. Ask the family what day of the week would best suit them and try to lock in a date.
9. “Are you looking at any other service providers?” This question will help you understand where the prospect stands in the research and decision making process.
10. “Can you see yourself coming to our site?” Follow up questions to this one could be “What do you think you’ll like/dislike about it?” This is a great way to gather feedback and understand how the customer is feeling.

## Frequently asked questions

### Logistical questions

Q: “How does transport work? What are the options?”

A: Each Endeavour Foundation site has different transport options in place and we’re continually working on improving our transport options for our customers but it can be a big investment. You most likely have some transport funding in your NDIS plan, if you like I’ll ask one of our NDIS specialists within Endeavour Foundation to give you a call to discuss this with you in more detail.

Q: “How often can he/she come?”

A: This is all dependant on how you want to use the Core Funding in your NDIS plan. If you’re interested I can refer you to one of our NDIS specialists who will be able to give you some options.

Q: “When are you open? Can we come on the weekend?”

A: Our service is open between XXX AM and XX PM on week days. We can accommodate customers who choose to start earlier or finish later through 1on1 support, but our NDIS specialist can discuss the options with you. If relevant: We also offer after-hours programs between XXPM and XXPM as well as a Friday night social club and weekend program.

### Service questions

Q: “What do you do here?”

A: Our learning and lifestyle services offer training and structured education programs through a variety of blended learning channels including theoretical, practical and online and we tailor our approach to the individual and their goals.

This is not a school, we’re more like a TAFE model. We treat our customers like adults and we have expectations of adult behaviour which can be a transition for some of our younger people. We help to build, practice and maintain skills to foster independence.

Q: “What does Endeavour Foundation offer?”

A: Endeavour Foundation supports people with intellectual disability to live, learn, work and flourish according to their own interests and priorities.

Whatever the goals – for life, work or personally – we collaborate with customers and their family to develop effective, personalised support that fits their needs and interests.

## **Our services include:**

### **Home**

For individuals thinking about moving into your own place for the first time, we can help. We can also provide in-home assistance ranging from support 24 hours a day, to assistance with personal care, household tasks and mealtimes. Our team will help you explore your options and get you to where you want to be.

### **Daily Living**

Making the most of daily life is important to us all. We can help our customers develop important daily skills to live independently, get out and about in their local community, or provide help around the house with daily tasks.

### **Work**

We have a range of employment and training options designed to help our customers reach their goals and find a job they love. With real jobs in a social and supportive environment, we can help you figure out what you want to do and the skills you'll need to get there.

### **Learning**

Whatever the goals of the individual – for life, for work and personally – we collaborate with our customers to identify the skills and knowledge needed to achieve them.

Working with our customers and their strengths and interests, we'll co-design a learning program that gets them to where they want to be.

### **Social and Community Participation**

Being connected to the community and social networks contributes to a sense of wellbeing, purpose and quality of life.

If our customers want to try a new activity, make new friends or just to get out and about, we have many options available.

## **Next Steps**

If a customer has indicated that they're interested in proceeding after the site tour:

1. You will need to complete the Referral form (QF8700.01/05) and submit to [practiceimprovement@endeavour.com.au](mailto:practiceimprovement@endeavour.com.au) along with any OT or medical documentation. This needs to be completed and submitted to your GM within 1 business day of the site tour. You will be able to provide your observations from the tour within this form.
1. Provide feedback to the Customer Service Team – NDIS Account Manager who organised the tour for you.

If a customer has indicated that they're not interested commencing services:

1. Provide feedback to the Customer Service Team – NDIS Account Manager who organised the tour for you. This needs to be provided within 1 business day of the site

tour.

If a customer is non-committal and needs time to think:

1. Provide feedback to the Customer Service Team – NDIS Account Manager who organised the tour for you. This needs to be provided within 1 business day of the site tour. The NDIS Account Manager will continue to nurture the customer.