

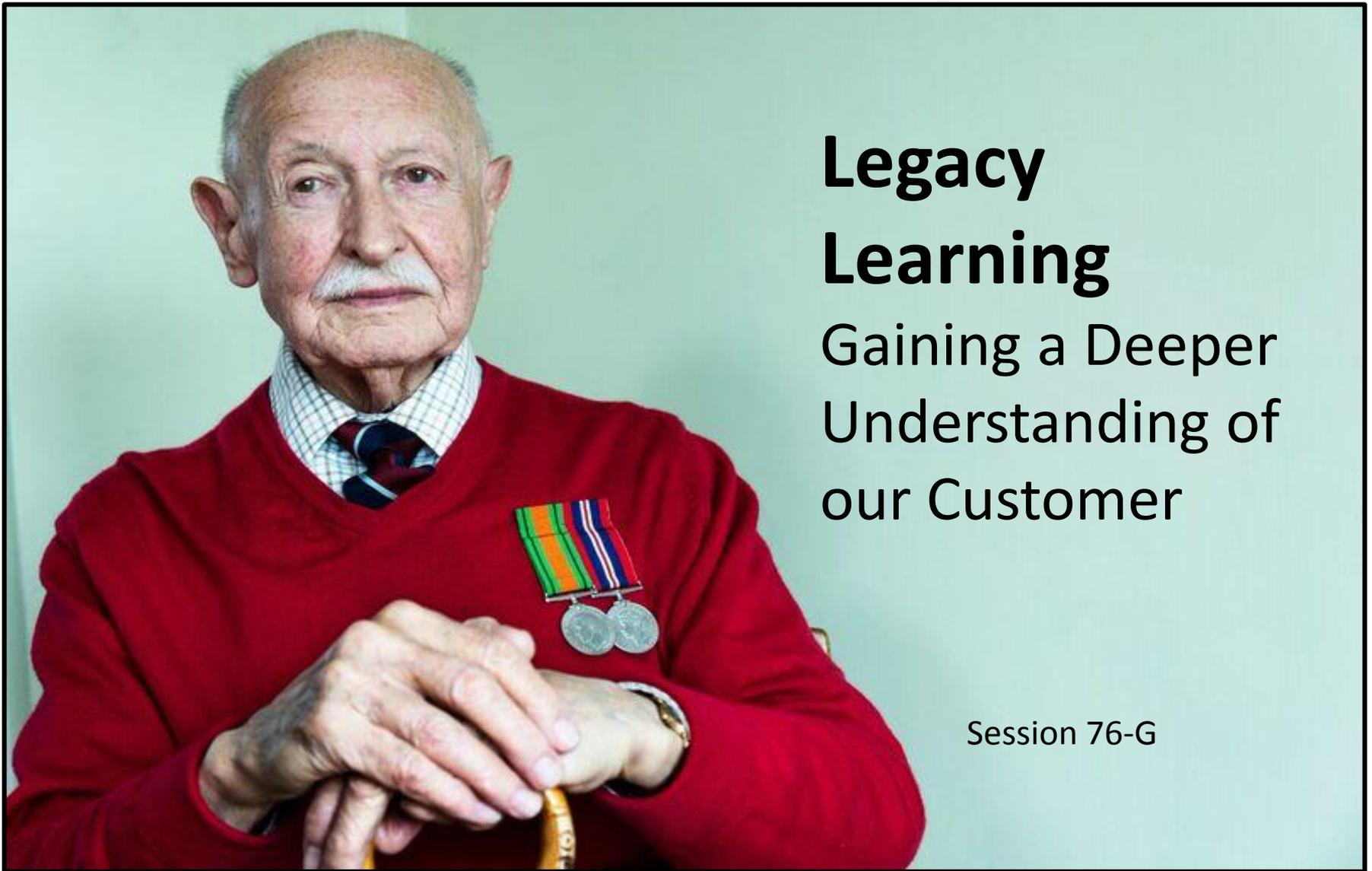
2016

ANNUAL MEETING & EXPO

BE THE DIFFERENCE

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Legacy Learning

Gaining a Deeper
Understanding of
our Customer

Session 76-G

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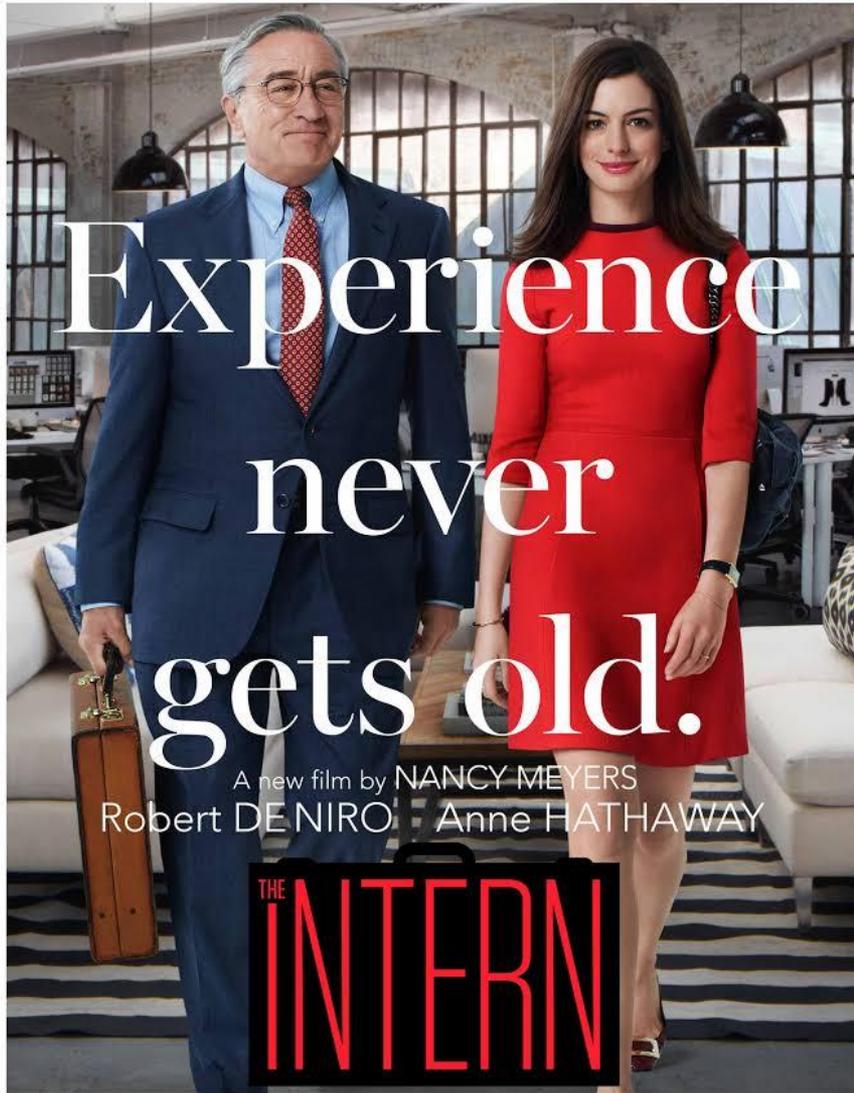
Kristin Kutac Ward
President and Chief Executive Officer
Solutions Advisors



Mike Brindley
Vice President of Associate Development
Solutions Advisors



Eric Eichhorst
Director of Sales
Applewood



Experience never gets old.

A new film by NANCY MEYERS
Robert DENIRO Anne HATHAWAY

THE INTERN

From the Writer/Director of
IT'S COMPLICATED, THE HOLIDAY, SOMETHING'S GOTTA GIVE

WARNER BROS. PICTURES PRESENTS
A WAVERLY FILMS PRODUCTION A NANCY MEYERS FILM ROBERT DENIRO ANNE HATHAWAY "THE INTERN" RENE RUSO MUSIC BY THEODORE SHAPIRO COSTUME DESIGNER RANDALL POSTER GEORGE DRAKOULIAS
FILM EDITOR ROBERT LEIGHTON PRODUCTION DESIGNER KRISTINEA DIRECTOR OF PHOTOGRAPHY STEPHEN GOLDBLATT, ASC, CSC. EXECUTIVE PRODUCER CELIA COSTAS PRODUCED BY NANCY MEYERS & SUZANNE FARWELL WRITTEN AND DIRECTED BY NANCY MEYERS

PG-13
PARENTS STRONGLY CAUTIONED
Some Material May Be Inappropriate for Children Under 13

September 25

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#theinternontheatres





“At first I really enjoyed the novelty of retirement...then the nowhere to be thing hit me like a ton of bricks”



“I realized the whole thing is to keep moving; get up, get out of the house and somewhere – anywhere.”



“And then of course are the funerals, so many more than I could have imagined. There’s a hole in my life and I need To fill it.”



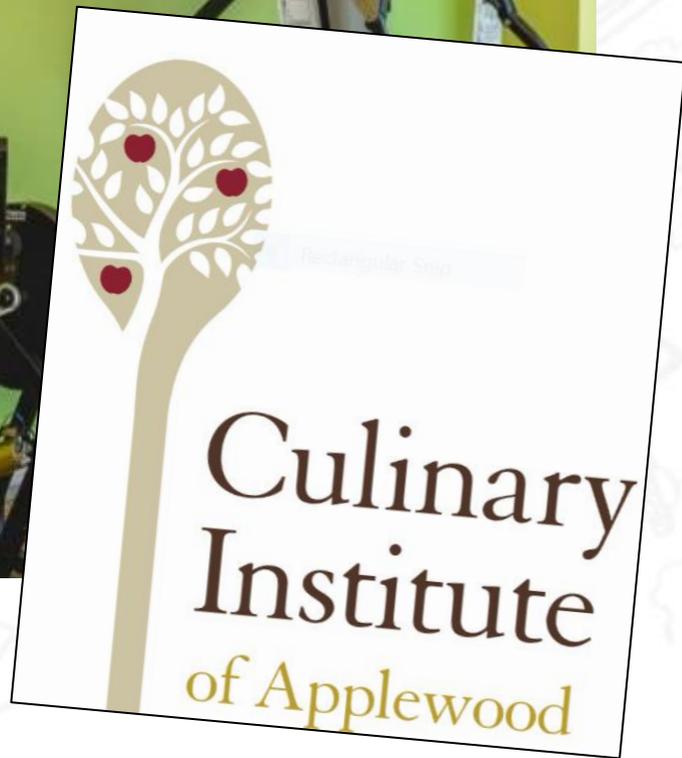
I want the connection..."

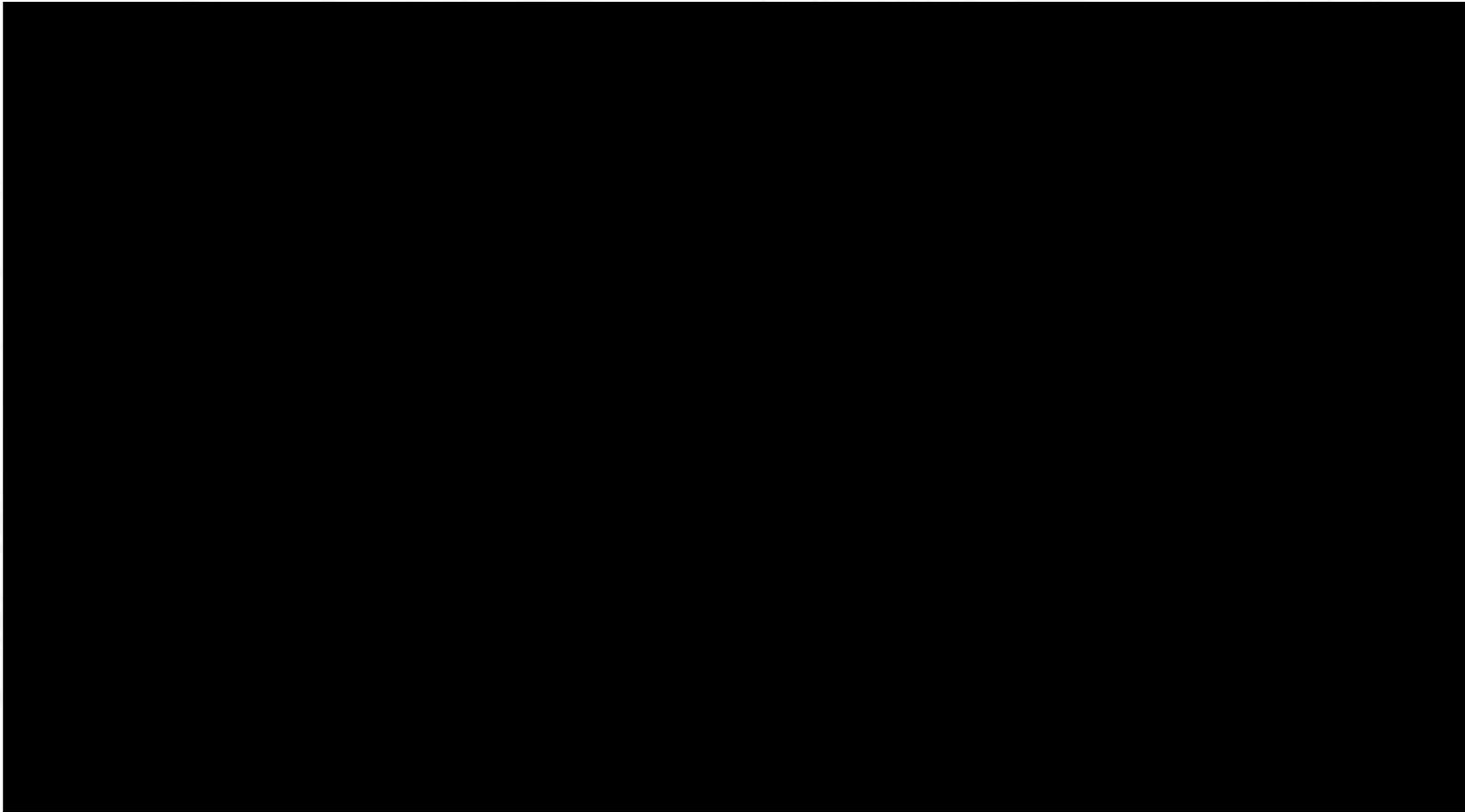
"The challenge..."



"I guess I might even want to be needed."







Lillian



Transactional Sales



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Transactional Sales

- Focuses too much on features and benefits
- Attempts to match features with prospects
- The sale is need-driven and based on immediate need.

We have a
great pool!

But I don't
swim

DISCOVERY

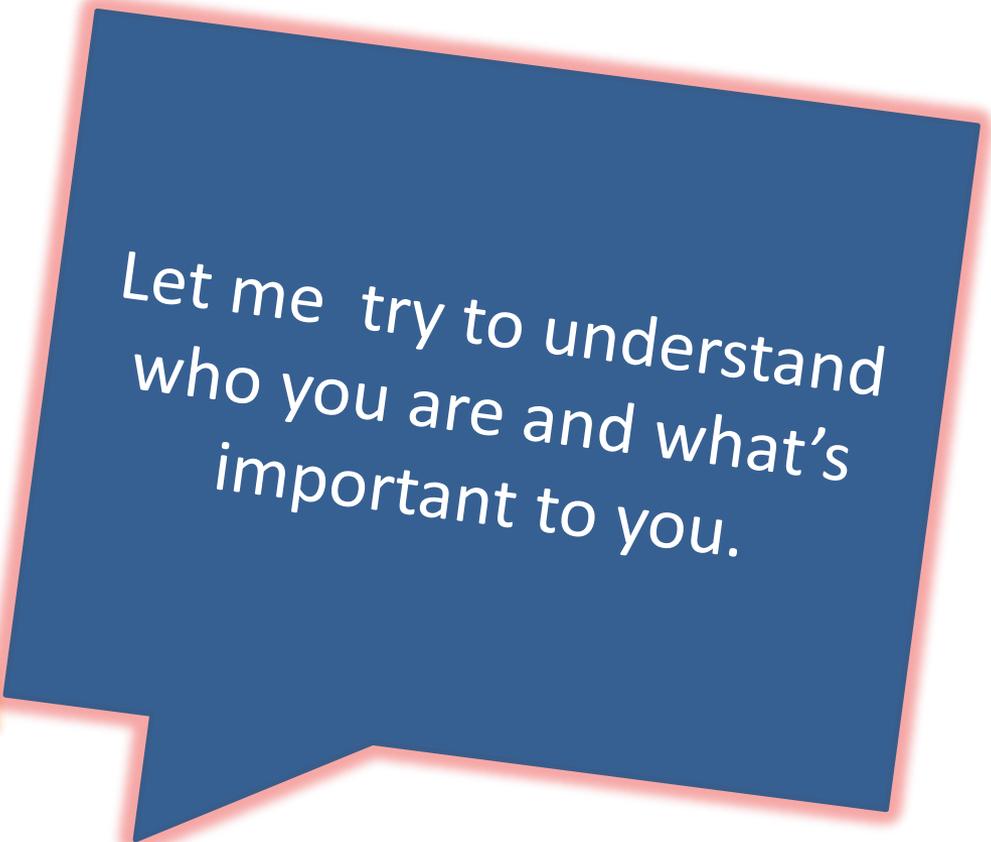


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Let me tell you about
our community.



Let me try to understand
who you are and what's
important to you.

Person-Centered Selling

- Connects the dots to identify ways the prospect wants to be remembered
- Helps you understand the prospect's life story
- Establishes rapport and builds trust
- Evokes emotional responses
- Allows empathy
- Gets the 'wow' moments of our prospects' lives

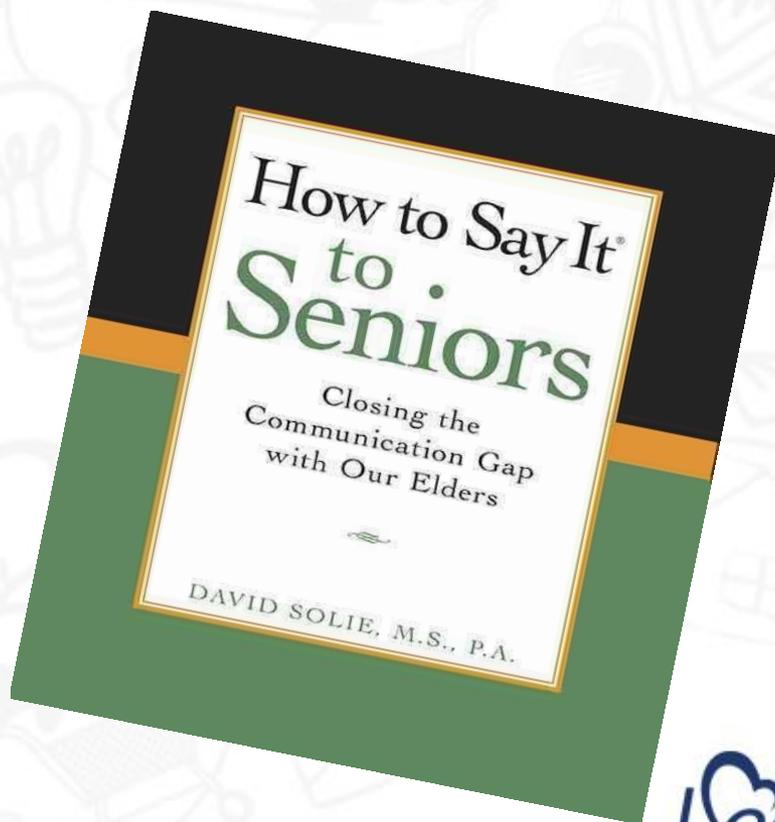


Picture yourself here!



Developmental Drivers

- Developmental Drivers of Older Adults:
 - Control
 - Legacy



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Why is control important?

- Control is the predominant thought process in the later phase of life
- Enables seniors to make own decisions
- Conducive to building legacy
- Fear of losing control is ever present

Loss of control over:

- Personal health
- Independence
- Finances
- Family and friends
- Professional status
- Appearance
- Home

Control Words

Conduct

Decide

Handle

Manage

Organize

Supervise

Choose

Direct

Control

Lead

Rule

Steer

Command

Create

Guide

Maintain

Pick

Select

Unwanted Advice

- Older adults will pull away or shut down if they feel like they are forced or losing control
- Salespeople feel like we have enough information and now we want to give advice – we know what they need
- Confronting their control provokes seniors
- Unwanted advice coming from the outside that appears to be disrespectful or taking control away

Today's Prospects Need Purpose

- A sense of purpose is a very important factor in successful aging.
- Understand what is important to your prospect: what gives them purpose – what gets them out of bed in the morning – what do they look forward to?
- Think about how this affects their thought process as they consider moving to a senior living community.
- Do we support their sense of purpose – or diminish it?

Importance of Legacy

Review of life

- How will I be remembered?
- How did I make a difference?
- What has shaped my values and integrity?
- Have I been a good family member, friend?
- Did I make a difference?

“Today I shall
behave, as if this
is the day I will
be remembered.”

Dr. Seuss

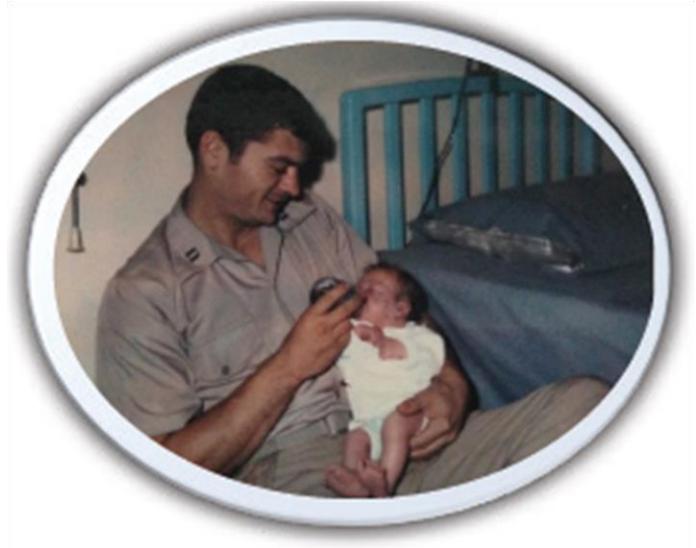
Life Review and Legacy

- All prior life stages look forward
- Most people don't have the skills to look back on their lives and reflect without assistance
- Continuous and involuntary retrospective where seniors weigh everything they have done in order to build understanding and acceptance of the life they have lived

Today's Prospects Value Legacy

- Who they are and what they were is important to them
- They want to maintain their identity as a productive member of society
- They want to leave something for their children and grandchildren
- They want their stories to be heard





Discovery vs. Legacy

Typical Discovery Question	Legacy Question
Do you still drive?	Tell me about your first car.
Do you like movies?	What is your favorite movie?
What brought you here today?	What are your goals for right now?
What kind of job did you have?	What do you consider your greatest accomplishment?
Do you have children?	What makes you happy?
What do you like to do?	What would you say is your life's motto?

Stages of Change

- **Denial**

- Denies interest
- *I'm not ready - ever*

- **Thinking**

- Considering –risk-reward analysis
- *I'm not ready yet*

- **Planning**

- Preparing – testing commitment and creating an acceptable plan
- *I'm getting ready*

- **Action**

- Initial change – consolidating change into lifestyle
- *I'm ready...to do something*



DENIAL

“Everything is
OK – I’m fine at
home, I’m never
leaving...”

WON'T



THINKING

“I’m having
problems – I
wish they’d go
away.”

WHETHER



PLANNING

“I need to move
but what do I do
with all my stuff?”

WHEN



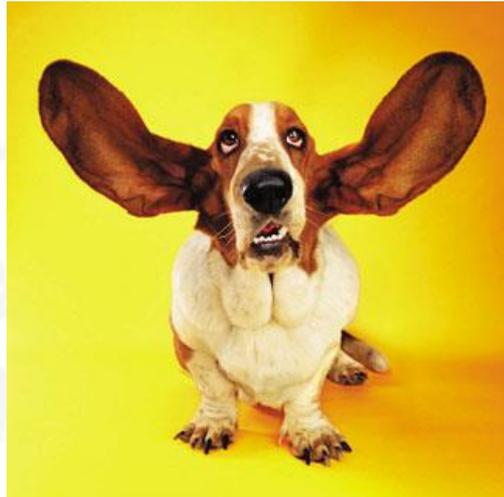
ACTION

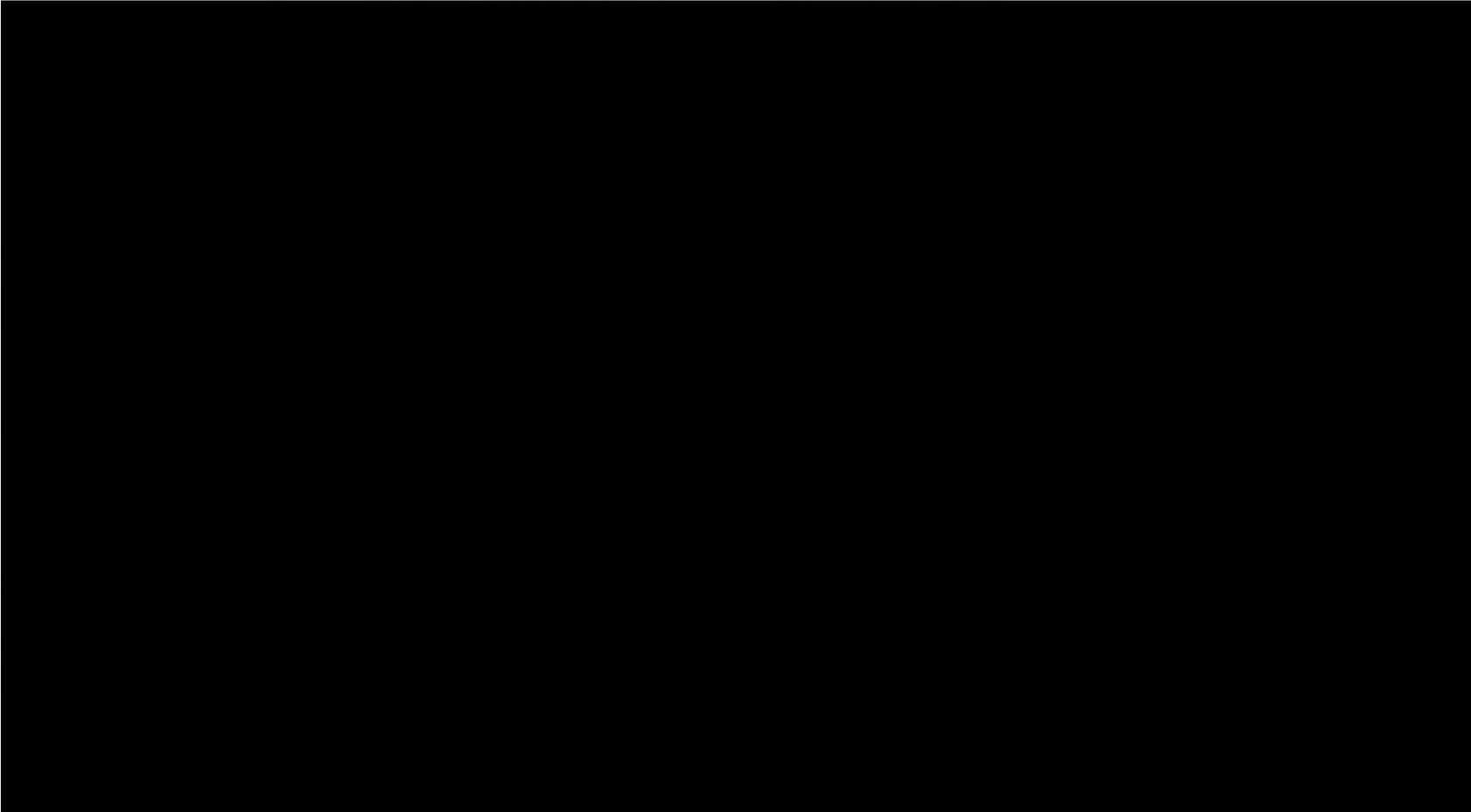
“I’m ready – I just
need to choose
the right
community”

WHERE

Listening is a Art

- Listening is intentional
- The greatest psychological need people have is to be listened to
- People aren't 'talked' into buying something they're 'listened' into it





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Legacy Surveys



Dining

1. How important are dining and cuisine to you?

- Not very
- Somewhat
- Important
- Extremely important

2. What is your preferred dining style?

- Restaurant style with full service
- Informal eat-in style
- Home cooked meals
- Deli-style including take-out

3. How often do you typically eat out now?

- Rarely
- Once a week
- 2-5 times a week
- Once a day

Please tell us more about you.

What do you consider your greatest achievement?

What would you say is your motto?

What was the happiest time of your life?

community could offer? (Check all that apply.)

- Health and wellness programming
- Robust activities
- Guaranteed access to health care (Continuing Care Retirement Community)
- Access to transportation services
- Other _____

5. Why would you move to a retirement community? (Check all that apply.)

- Relief from home maintenance
- Companionship and social contact
- Recreation and leisure opportunities
- Transportation services
- Personal safety
- Other _____

Thank you!

Use the postage paid envelope to mail back your completed survey and leave the cooking to us!

Complete and mail your survey and in return we'll open our doors for you and a grant to experience the magic of the Applewood culinary team. Chef John Todd, a graduate of the Culinary Institute of America, will delight with a gourmet brunch that rivals Freshford's best restaurant!



If a friend or family member would like more information about Applewood, please provide their contact information below.

YOUR INFORMATION

Name (id) _____
 Address _____
 City/State/Zip _____
 Telephone _____
 E-mail _____

FRIEND/FAMILY MEMBER INFORMATION

Name (id) _____
 Address _____
 City/State/Zip _____
 Telephone _____
 E-mail _____

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What do you consider your greatest achievement?

- *Being Director and Founder of a non-profit wildlife organization.*
- *Architectural statements in 5 continents, seen 276 cities, 37 countries, published a book, composed music and created many art paintings.*
- *Traveling throughout many countries in the world... solo.. And with confidence*
- *Going back to college after marriage and having 2 children. Earning 2 degrees Bachelor's and master's during middle age*

What was the happiest time of your life?

- *Each decade of my life has brought its own happiness*
- *Spending time with grandkids – it's the best retirement period*
- *I think it's right now. Every day is stress free and carefree with happiness waiting to unfold.. A joy of discovery*
- *Touring 7 countries in the world as diplomat*

What would you say is your motto?

- *Life is not a dress rehearsal. Enjoy!*
- *Stay erect and keep moving.*
- *Remember the best. Forget the rest.*
- *90% of things we worry about never come to pass.*
- *We have two lives, and the second begins when we realize we have only one. - Confucius*

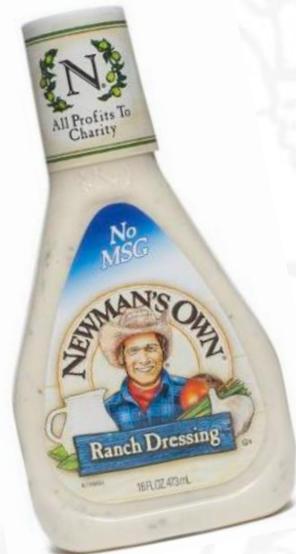
Creative Follow Up

- One of the biggest complaints from sales people is they don't have a good reason to pick up the phone and follow up with a 'stuck' prospect...
- The number of personal touches to convert a sale has increased four-fold...
- Creative follow up evolves out of a prospect's story – if you listen well enough you will find creative ways to connect.

Creative Follow Up

- Is very personal, sincere and demonstrates to the prospect that you listened and understand - and therefore builds trust
- Must be meaningful, relevant and customized
- Is more cost effective and meaningful than monetary incentives
- Can be fun and motivating for both the sales person and the prospect
- Initiates the rule of reciprocity

Creative Follow Up



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Personal Proposals

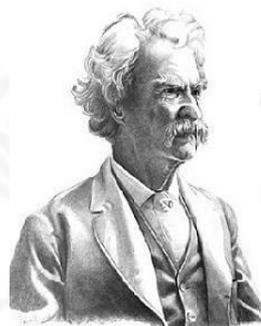
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A day in the life at Applewood for Mr. & Mrs. Burke



As you continue to consider your options at Applewood, I have created an outline of what a “typical day” at Applewood would be like for you at our community.



Age is an issue of mind over matter. If you don't mind, it doesn't matter.

Mark Twain

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A day in the life at Applewood for Mr. & Mrs. Burke



With 10 Fitness & Wellness classes scheduled each week and the opportunity to work with a personal trainer daily, staying in shape will no longer be a chore. Water aerobics, strengthening and balance classes are just a few of the many opportunities to take advantage of each day!

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A day in the life at Applewood for Mr. & Mrs. Burke



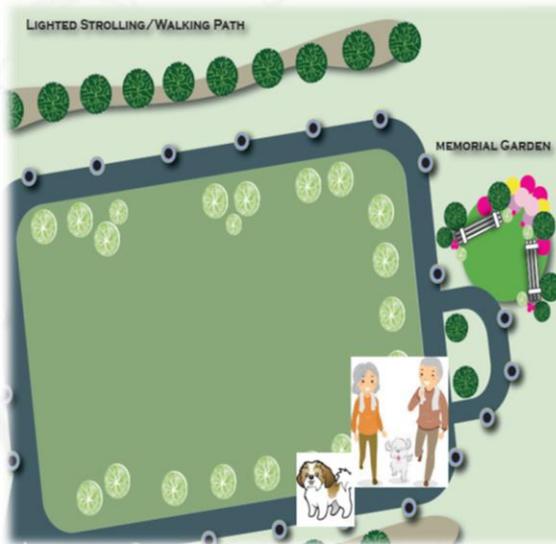
In addition, our location is a central hub between Philadelphia and New York City. You can take advantage of the world-class dining, theater, recreation and culture of the metropolitan areas.



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A day in the life at Applewood for Mr. & Mrs. Burke

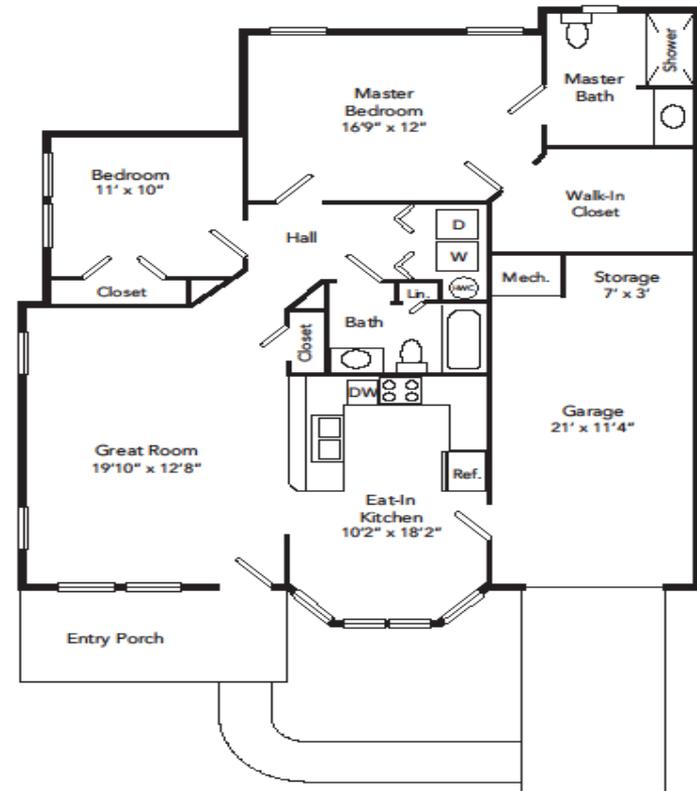


Walking out of your cottage front door onto the 40 acre campus at Applewood you have plenty of room to walk Ruffy and Bam Bam including a 1/4 mile paved/lit walking path new for 2016!

Floorplan: Monarch Cottage

Monarch
2 BR Cottage

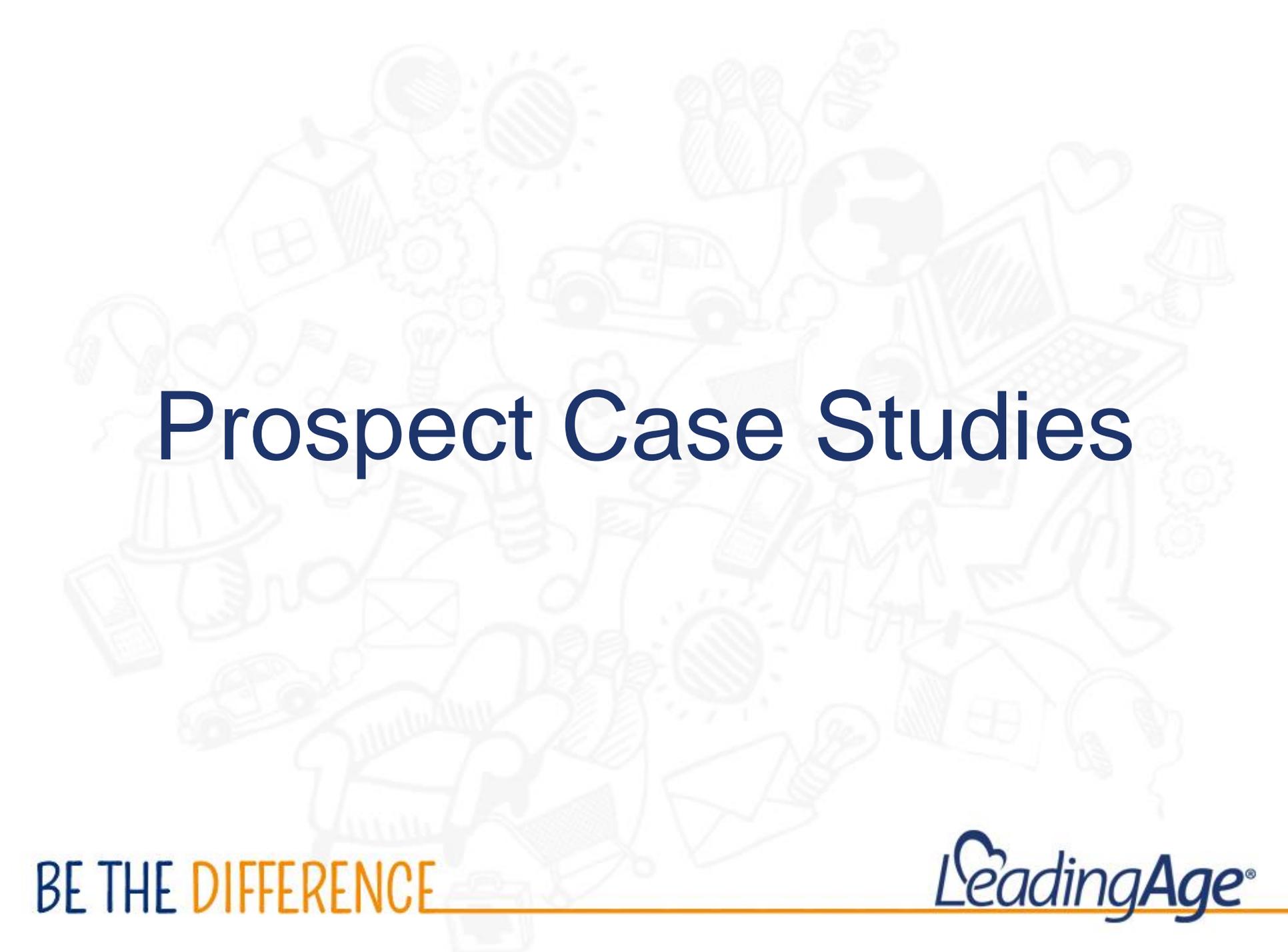
entry fee _____ future plan _____
monthly fee _____ estate plan _____
rates good thru _____



notes

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Prospect Case Studies

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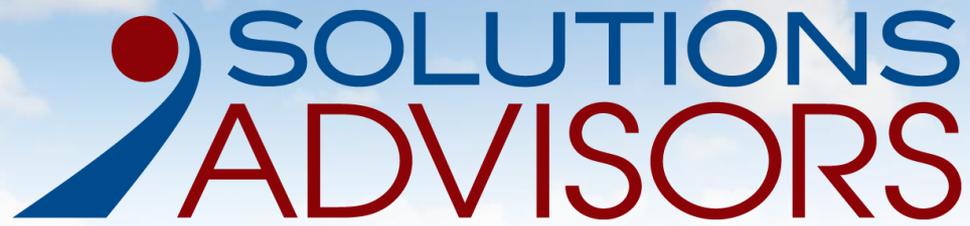
PROSPECT CASE STUDY



BIOGRAPHICAL	
Name / Age:	
Personality Type:	
Legacy:	
Health:	
Financial:	
Current Living Situation:	
Key Influencers:	
KEY MOTIVATORS	
In what stage of readiness are they?	
Why move at all?	
Why here?	
Why now?	
Prospects wants and needs:	
Prospects goals:	

Legacy Learning

- Learning a person's story, who they are and what's important to them leads to empathy and trust
- Listening is the key to better understanding of a prospect's stage of readiness
- Legacy opens the door to creative follow up on a more personal level
- Legacy learning gives permission to slow down, make connections, build relationships and gain a deeper understanding of your customer



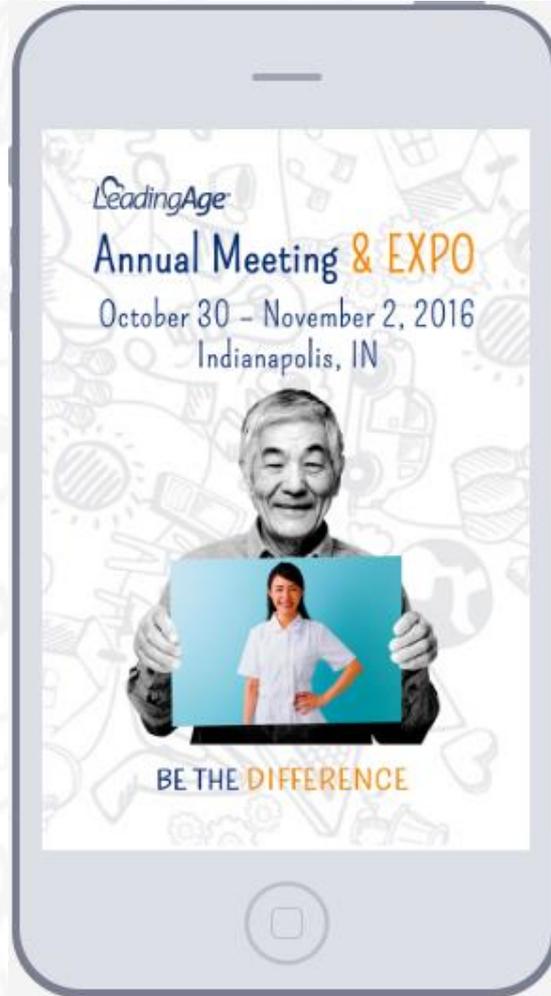
Values. Strategy. **RESULTS.**

*Building relationships through integrity,
transparency, loyalty and entrepreneurship.*

Senior Living Experts

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