

***Creative Follow-up
in Senior Housing Sales
Business Partnerships
and Life***

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What We'll Cover

- Prospect Centered vs. Transactional Approach
- Stages of Readiness:
 - Hot, Warm, Cold v. Action, Planning, Thinking, Denial
- The Power of Legacy
- Advancement planning (top 10 board)
- Creative Follow-up



Know Yourself

Six Essential Skills for Successful Selling

- 1) Relationship Building
- 2) Persistence
- 3) Initiative and Self-Discipline
- 4) Time Management
- 5) Competence
- 6) Commonality



Three Key Factors to a Large Sale

1. The large sale requires multiple contacts
2. Psychologically, the larger the sale the more emphasis is placed on the salesperson as a factor in the decision
 - The seller and product become inseparable in the customer's mind
3. The most important deliberations take place when the prospect is **NOT** in the presence of the sales person



Know Your Customer

Generational Cohorts and Their Role

- GI Generation
- Silent Generation
- Baby Boomers





The Changing Face of Senior Living



Developmental Drivers

“How to Say it to Seniors” – David Solie

Developmental Drivers of Older Adults:

- Control
- Legacy



Why is Control Important?

- Predominant thought process in the final phase of life
- Enables seniors to make decisions
- Conducive to building legacy
- Perception of loss



Loss of Control Includes Loss of:

- Personal health and independence
- Family and friends
- Reverence
- Personal finances
- Driver's license
- Home

“Only
YOU can
control your
future.”

Dr. Seuss



Loss of Control Issue	Solving with Unwanted Advice
Health Concerns	We have 24 hour staffing
All my friends are dying	We have a great activity program
I don't feel important	We have so many councils that you can join
I don't know if I can afford this	We have many flexible options to choose from
I don't drive anymore	You don't have to, we have a transportation program!
My family grew up in this home	We have many spacious floor plans to choose from



Today's Prospect Needs 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



Typical Discovery Questions	Legacy Questions
Do you still drive?	What was your first car?
Do you like movies?	What is your favorite movie? Who was your favorite actor?
Do you like to travel?	Tell me about your favorite vacation.
What care needs does your husband/wife have?	How did you meet your husband/wife?



Today's Prospect Values 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



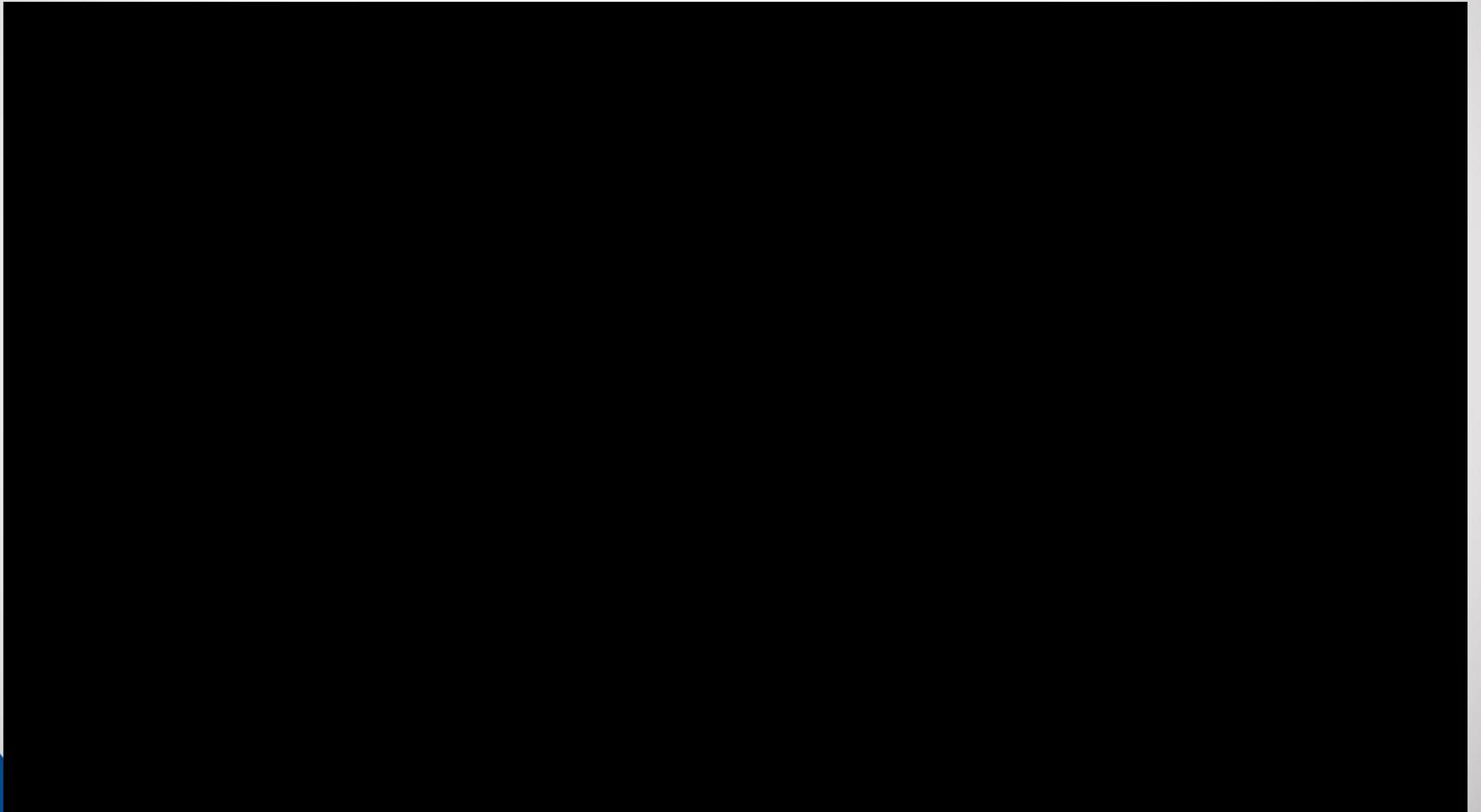
Current Sales Approach in Senior Living

Transactional Sales

- Matching benefits and solutions to prospect's needs
- Focuses on what's different or better based on community's strengths
- Usually non-relational
- Typically need-driven based on health care crisis or immediate change



Transactional Sales Approach



The Industry Has
Changed...We Need to
Adapt our Approach.

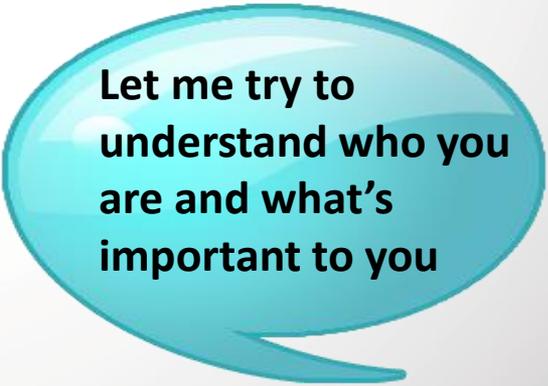


What is Prospect-Centered Selling?

- It's about 'guiding' and 'inspiring' - rather than leading and persuading
- It's about asking better and deeper questions - rather than selling features and benefits
- It's not just building a 'relationship' but connecting emotionally



**Let me explain
The benefits of
Our community**



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

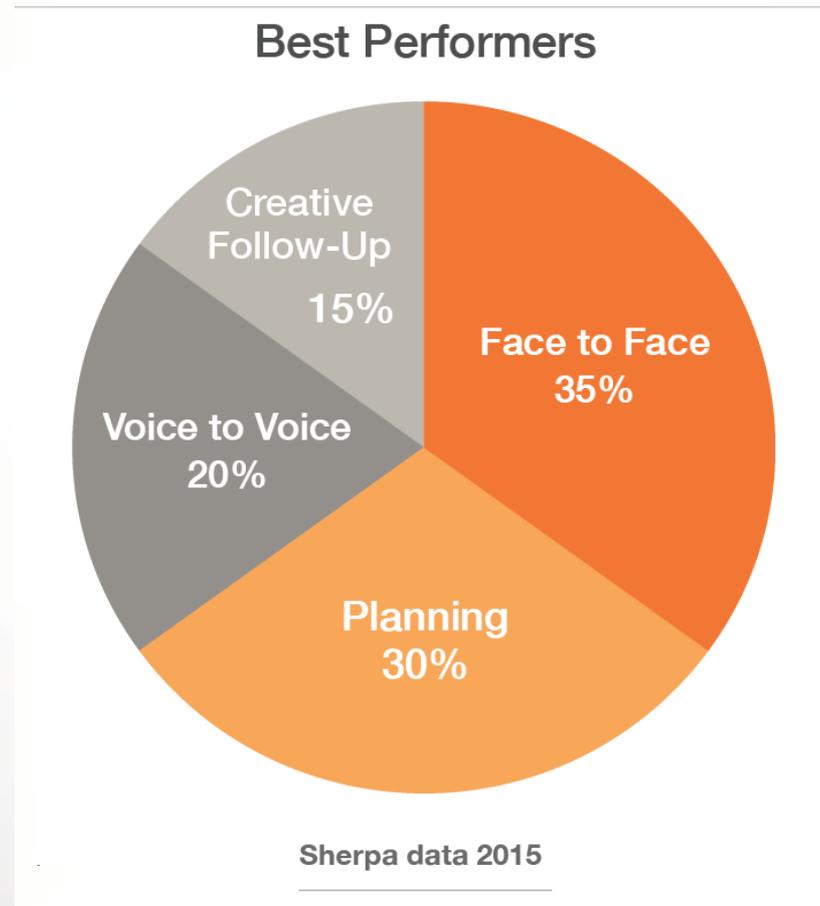


Prospect-Centered Selling

- Connects the dots to assist the prospect in identifying the way he/she wants to be remembered
- Helps you learn the prospect's life story
- Enables you to establish rapport and build trust
- Evokes emotional responses and allows for empathy
- Gives us “wow” moments into the lives of our prospects



Key Performance Indicators



Stages of Readiness

- Hot/warm/cool – typically based on our artificial timeframes and tells us little about the prospect's readiness
- Think about the prospect's timeline instead of your own
- Prospect centered selling re-categorizes where **they** are in the decision process
- **Denial, Thinking, Planning, Action** – or think of as 4 W's: "Won't" "Whether" "When" and "Where"



Stages of Readiness

- **Denial**

- Not interested
- 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



Denial

Challenges

- Not considering, not now not ever
- Beliefs and Expectations
- External Pressures
- Reluctance
- Resistance
- Rationalizations

Strategies

- Listen closely
- Confrontation breeds resistance
- Respect the power of choice
- Treat rationalizations as reasons – respect them



Denial	Overcoming Denial
I still maintain my own home	Your home sounds wonderful, why would you consider moving?
I still cook	What was your favorite meal to cook?
I still drive	What was your first car?



Thinking

Challenges

- Cost benefit analysis
- Pros and cons
 - Status Quo
 - Change
- Ambivalence –
Head versus heart
- Less defensive

Strategies

- Their reasons NOT yours
- Explore key values
- PATIENCE!
- Build Confidence with
prospect



Ambivalence

Uncertainty or fluctuation, especially when caused by inability to make a choice or by a simultaneous desire to say or do two opposite or conflicting things.



Examples of Prospects in Thinking

Questions to Help Prospects Advance

Should I move or should I stay?

On a scale of 1-10, how ready are you to make a move? Why not a **lower** number?

I have so much stuff

What is your most valuable possession?

What if I don't fit in?

What do you like most about your current lifestyle?



Planning

Challenges

- Commitment
- Prioritizing
- Planning
- Managing Stress
- Looking to future

Strategies

- Choices
- Setting a Date
- Seeking Support
- Making effective plans
- Making acceptable plans
- Making accessible plans



Examples of Planning	Questions to help prospects advance?
I need to move somewhere else	When was the last time you made such a big change?
I need to speak to my daughter about moving	What do your children think about you considering a move?
I have to discuss this with my financial planner	What are the most important questions you need answered?



Action

Challenges

- Unanticipated Difficulties
- Flaws in the plan
- Decisional Regret
- Keeping Commitment
- Getting used to changes

Strategies

- Anticipate the Unanticipated
- Fix the Plan
- Redo the cost benefit analysis
- Focus on the benefits of change
- Reinforce change



Examples of Action	Questions to Advance to Commitment
Where should I move?	What is most important to you about a community?
I'm not sure if this is the right place for me.	What did you like most about the other places you have looked?
I am ready to choose a home.	Would it be beneficial to you if we created a furniture plan for the apartment you liked?



TECHNIQUE

- The Communication Cycle
- Advancement Planning and Top 10 Board
- Creative Follow Up



Communication Cycle



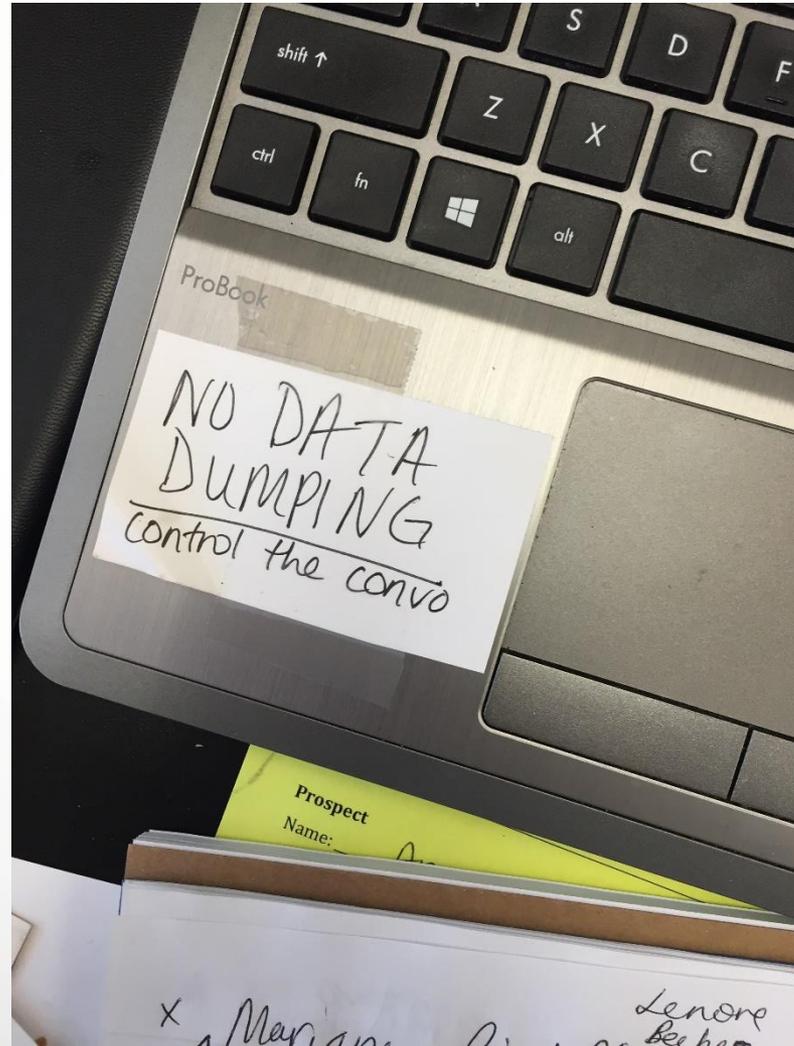
You don't talk anyone into buying anything; you **LISTEN** them into it.



Does your Discovery resemble this?



No Data Dumping



The real key to listening is wanting and intending to do so.

The greatest psychological need someone has is to be listened to.



Top 10 Board

- Daily for 10-15 minutes
- Full review at weekly or monthly sales meeting\
- Fluid – not a “task list”
- Can be manual (white board) or in electronic format
- Discuss ways to advance – how to get “unstuck”
- Utilize team knowledge
 - Executive director
 - Entire sales team
 - Others as appropriate – activities, food service, etc



Prospect	Stage of Change	Legacy	Motivators	Creative Follow Up	Advance/ Next Step	Due Date/Resp Person	Timeframe
Ernie	Thinking	12 grandkids, carpenter	Fear, no kids nearby	Sent bday card with tools on it	Have van pick him up for woodcarving class	Polly 9/3 class	2-3 months
Alice	Planning	Nurse, worked until 72	Health – does not want to be burden to kids	Send article from AHCA on nurses	Talk after her kids visit end of month to get commitment	Ann Mail 9/4	1-2 months
Dot	Thinking	Math Professor	Stairs in house and upkeep	Send article on de-cluttering tips	Get commitment for tour of cottage	Mike Mail 9/3	4-6 months





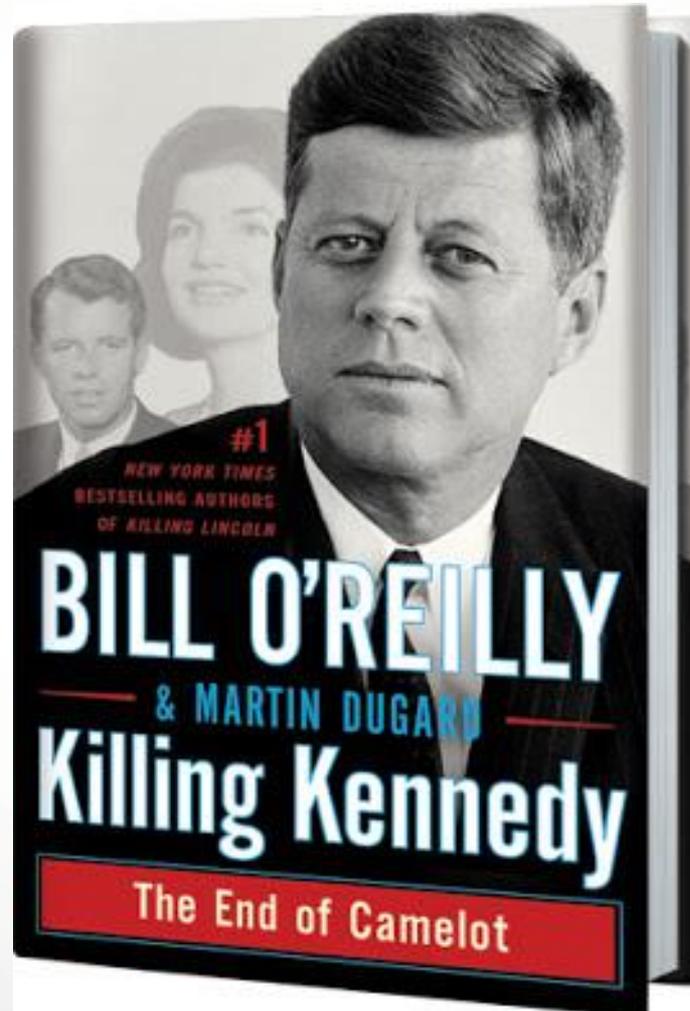
Creative Follow Up

One of the biggest complaints from senior living sales counselors is that they don't have a good enough reason to pick up the phone and make another call to a prospect, especially when they are "stuck" and the prospect isn't committing to additional interactions, or hasn't been contacted in a long time.

At the same time, we know the number of personal touches it takes to convert a sale has increased four-fold over the past decade. Can yet another follow up call, personal note or home visit really make a difference in your sales efforts?



Killing the Prospect - with Kindness



Killing the Prospect - with Kindness

During a conversation with a prospect in Dallas, Texas, it was revealed that he loved history books and was a fan of Fox News. Since it was the 50th anniversary of the Kennedy assassination, the sales person purchased the book *“Killing Kennedy”* written by Fox News host Bill O’Reilly and dropped off the book personally to the prospect’s home. Days later, a thank you note was received and the prospect invited the sales person to “borrow the book anytime”. Thus, a personal relationship was formed and the prospect advanced from the Thinking Stage to the Planning Stage – all for the small price of a book.



11/19/13

Dear Jennifer,

I greatly enjoyed "Killing Lincoln" It was thoughtful of you to remember that I favor historical novels. Thanks so much!

If you have an interest in reading the book, it is available and you are welcome.

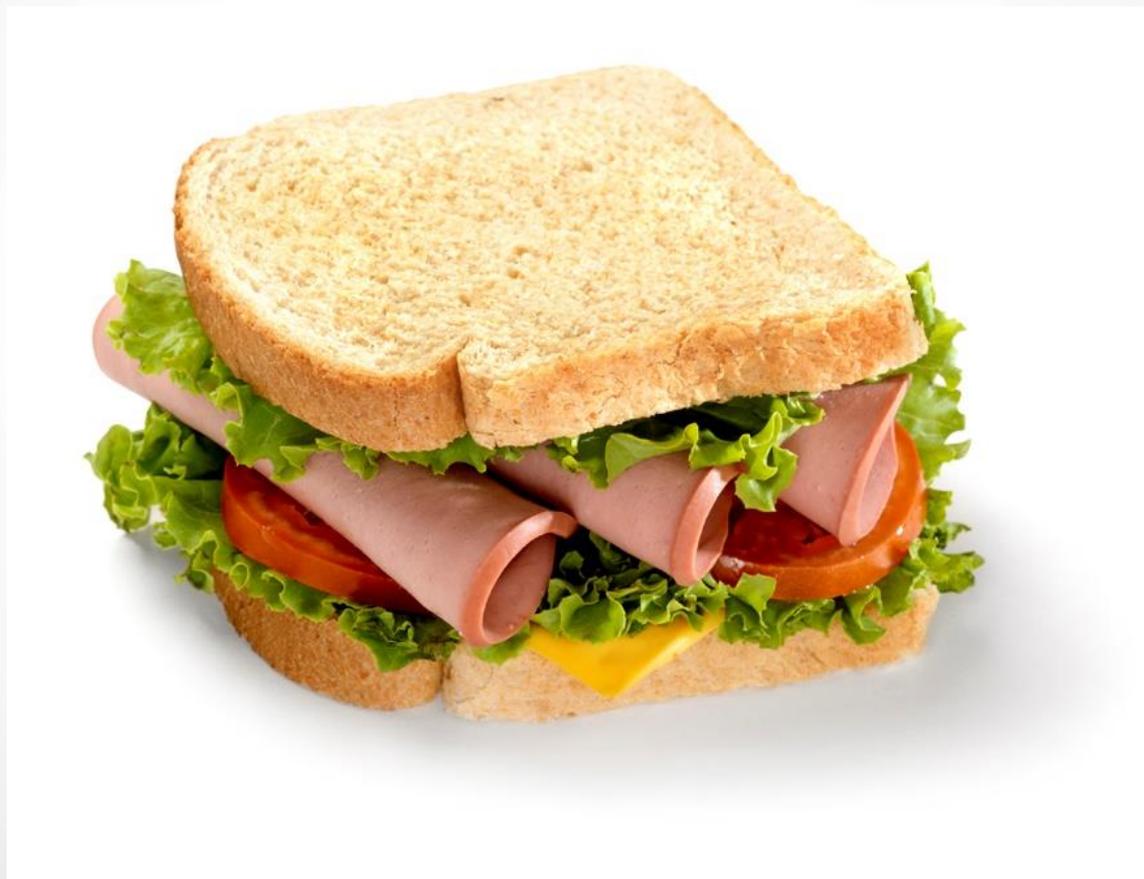
Warm Regards,

Harold

P.S. Great win for the
"aints" on Sun!



A Simple Baloney Sandwich

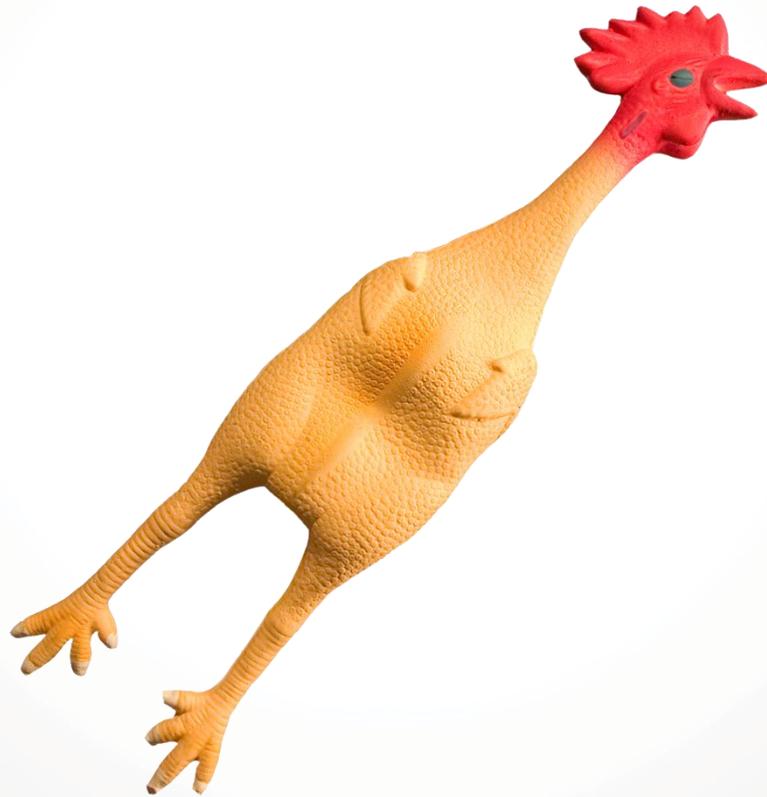


A Simple Baloney Sandwich

- A prospect who is a cancer survivor told the sales counselor that she used to eat garlic bologna sandwiches every day for years but hadn't had one since she lost her taste buds to chemotherapy. Together they joked about their mutual love for garlic bologna sandwiches. Days later, the sales counselor surprised the prospect at her home during lunch time with - you guessed it - a picnic basket that included a garlic bologna sandwich. They got a deposit the following week from a grateful prospect who knew that the sales person truly cared about her well-being.



Rubber Chicken



Rubber Chicken

- A prospect considering a move to a new community complained to the sales counselor that all they served in the dining room of her current community was “rubber chicken.” Sensing an opportunity for *Creative Follow Up*, the sales counselor sent the prospect a dinner invitation and arranged with the chef to serve a real rubber chicken at dinner. When the lid of the tray was removed and the rubber chicken revealed, the prospect had a good laugh and vowed to take the fake chicken with her to show all her friends. Of course, the rubber chicken was replaced with a delicious entrée, the prospect had a dinner she won’t soon forget, and a special relationship was forged thanks to the sales person’s initiative and *Creative Follow Up*.



Commemorating a War



Commemorating a War

An in-depth and personal conversation revealed a prospect's service during the Korean War – what many call the “forgotten war.” The prospect's service was obviously a key part of his story and legacy. The sales person visited www.survivalstraps.com and purchased a bracelet commemorating service in the Korean War and sent it to the prospect. He called the community immediately because he was going to show it off to his friends and war buddies. The sales person not only demonstrated that she had listened to the prospect, but that she knew the prospect's war service was an important part of his legacy.



Pets!



2000 Windrow Drive
Princeton, NJ 08540

Pet Amenities

- Main Building Access (except food areas)
- FREE Daily Biscuits in the Mailroom
- Not only do our residents have bios, but so do their pets
- Beautiful walking trails to walk your dog
- FREE Princeton Windrows Bandannas to enhance your pet's wardrobe



Anita showing off Brier-Rose while taking a lovely walk through one of our beautiful trails

PW²

Princeton Windrows - Pets Welcome

Princeton Windrows is a pet-friendly environment, and we are happy to welcome you and your furry companions to our community. Check out some of our interesting residents and their furry friends.



Fred & Beau just taking some time out to smell the roses



Pets!

- *I sent a picture of the condominium and amenities with paw print stickers to show the path she can take while walking her dog.*

- J. Sabag, Bethesda MD.



From our Clients:

- *I sent a post card from St Louis with a picture of St Louis on it letting her know I was thinking about her and that I wish I had a chance to visit her college. She is in her 90's and mentioned once how she went to college in St Louis.*
- *I sent a booklet of all hiking, climbing, walking trails, and sailing areas in the local area. This was for the prospects that described themselves as adventurous - even though the husband uses a cane and has trouble walking.*



From our Clients:

- *I sent a beautiful small box filled with bolts. A prospect mentioned she makes jewelry out of bolts and other materials from the hardware store, so I sent her the box with bolts and let her know I never knew I would be thinking about jewelry while shopping at Lowe's.*
- *The prospect mentioned briefly he likes to drink Chivas. Our sales counselor made a home visit to deliver condo documents and brought a bottle with her, telling him "this might help you get through the documents a little easier."*



Personal and Professional

- American Flag to New Citizen
- Baklava
- Golf Cards
- Oklahoma Sooners



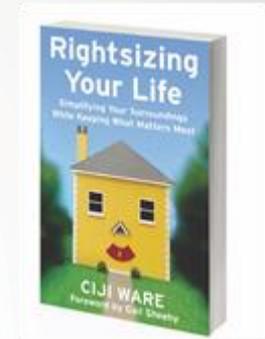
“Challenge yourself creatively
and take the big leap...
Make your dreams a reality!”

Dr. Seuss



Top 10 Books:

1. **A Teaspoon of Courage** by Bradley Trevor Greive
2. **Finding Your Way after a Spouse Dies** by Marta Felber
3. **How to Say it to Seniors** by David Solie
4. **Cheeseburgers for Seniors** by John Graham
5. **Rightsizing Your Life** by Ciji Ware
6. **The Retiring Mind** by robert P. Delamontagne
7. **The Book for People Who Do Too Much** by Bradley Trevor Greive
8. **Don't Toss My Memories in the Trash** by Vickie Dellaquila
9. **Widow to Widow** by Genevieve Davis Ginsburg
10. **Making Peace with the Things in Your Life** by Cindy Glovinsky



Thank you!

Questions?

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