

The Winning Sales Presentation

Alzheimer's and Assisted Living Communities

Marketing Comes First

- *Marketing comes first in our activities as managers. The marketing department must first attract and then convert prospects into residents. If Potomac Homes is to be successful, residents, families and employees alike must all be marketers.*
- *Everyone should be taught to recognize that a fully occupied community is a financially sound community and that referrals are critical to their own stability.*
- *Employees on all levels need to be taught to acknowledge the importance of marketing to their own personal success; this applies equally to the caregivers, activity director, the general manager, and even the president of the company.*
- *Everyone must adopt a marketing mindset.*

Expect - Get = Quality

- *Having the marketing mindset, though, is not enough.*
- *Employees on all levels need to be committed to delivering a quality product. If operations cannot deliver on the promises of the sales counselors, you will end up sabotaging your marketing success time and again. If you do not have a quality product, then you are wasting your marketing dollars attempting to create demand for something that people do not want.*
- *Management must therefore convince employees that they are delivering a quality product. Quality is simply the difference between what people expect and what they get.*
- *If the employees are personally committed to exceeding the residents' expectations, then the home will be perceived as a quality operation. This commitment to service does not come easily. It is the result of painstaking training, motivation, and employee recognition on a daily basis.*

What are Customers Seeking?

- *Clean, Professionally operated Community*
- *Knowledgeable and friendly staff*
- *Confidence that their loved one will receive the care they need without problems*
- *Personal interest in their situation*
- *Stimulating environment*
- *Consistency = Credibility*
- *Fair price and good value*
- *NO SURPRISES !*

Why Its Important

- *Often thousands of dollars are spent to attract prospects to your community*
- *You never get a second chance to make a first impression - first impressions set the stage for the entire experience*
- *Preparation for the Tour is Critical.*

Prepare the Home for the Tour

- *Be sure all vacant rooms are show ready! All rooms must be turned over and made ready for showing within 36 hours of move-out. If you suspect the resident will not be returning from the hospital, have the room repainted.*
- *Remove all tape from walls and furniture*
- *Patch and repaint/touch-up all walls*
- *Remove ALL personal items from prior resident, empty all furniture, drawers, armoires.*
- *Redecorate with towels, comforter, pictures, and display items.*
- *Be sure floors are immaculate.*
- *Turn on light just prior to tour and straighten bedding.*
- *Remove any wheelchairs, walkers, DME or diapers from room.*
- *Be sure all drawers and armoire are empty of prior resident's belongings.*

Prepare the Home for the Tour

- Empty all trashcans, take garbage outside to cans. No stinky garbage in house or on porches.
- Lightly freshen air if residents have just been toileted.
- Be sure the TV is on with the activity calendar up on the screen, make certain that the activity featured for the date and time of the tour is actually underway!
- Check all bathrooms (especially staff bathroom) and straighten, remove anything on floors, flush all toilets. Make sure there is toilet paper and paper towels in guest bathroom.

Prepare the Home for the Tour

- Check and straighten porch furniture – front and back
- Police outside areas for trash - especially gloves.
- Remove all clutter inside the building, includes top of refrigerator, activity table, bookcases, side server, etc.
- Put on the house music – playlist – 50's music
- Be sure the daily calendar and activity sheet are today's date!

The Greeting - First Impression

- A good first impression is important. All staff answering the phone should participate in a marketing orientation program and ongoing training to reinforce the importance of their position to the success of the sales process.
- Key points:
 - The phone should be answered in a timely and professional manner. No more than 3 rings.
 - The greeting should be friendly and cheerful using the company's name and preferably their name as well. People can "hear" a smile, use one when you answer the phone.
 - If the marketing representative is unavailable, the receptionist should ask if they would "either like to leave a personal message on [Susan's] voice mail or I would be happy to take your name and telephone number and have [Susan] return your call."

Pre-Qualify

- The Marketing Representative should be warm, professional, and identify his/herself by name.
- Obtain basic information: inquiring for themselves or someone else? Who? Contact/prospect name, address, telephone number. How did they hear about the community? Current living situation (home, alone, staying with others, area, urgency), own or rent?
- Pre qualify as to appropriateness and affordability
- Create desire/urgency to visit. Try to schedule an appointment.
- Send personalized letter with brochure in a timely fashion - include personal details from your phone conversation when at all possible.

Curb Appeal

- Appearance of building and grounds
- Is the parking lot free of trash and recyclables?
- Appearance of interior - area warm and welcoming? Clean, odor-free?
- Replace burned-out light bulbs
- Pick-up trash (no garbage bags at entrance) and debris, especially after snow melt or storms
- Reserve adequate parking close to entrance for visitors
- *Freshen public area bathrooms frequently*

Greeting

- Take a deep breath and focus before meeting your appointment
- Smile, extend a warm welcome
- "Make a friend, then make a sale"
- Invite into a private area for "discovery," offer refreshments.
- Review initial informations and formulate your questions in advance.
- Complete RIF and begin probing.
- Practice active listening skills do not pretend to know what's best for the client. Let them talk, prompt for additional information, paraphrase to show them you understand.
- Sympathize with them and set them at ease.

Information Gathering

- **Welcoming/Rapport Building**
 - *Identify common ground. "From the same town? Oh, Dr. Cameron referred you - we had a wonderful experience with her. What an unusual pin, my mother handicrafts her own jewelry..."*
 - *Mirror body language and voice tones.*
 - *Show a genuine interest through eye contact, listening.*

Information Gathering

- **Determining Needs/Desire**
 - *Ask open ended questions in order to get the prospect talking about their particular situation. e.g. "What prompted your visit today?", "How did you learn about Potomac Homes?"*
 - *Clarify answers, it shows that you understand and prompts for additional information.*
 - *Testing questions "How does the homey atmosphere that we provide here match up with your mother's needs?"*
 - *Probe to learn more about current lifestyle - what, if anything, is missing? How can it improve? What are their interests-hobbies, past times, groups, etc.. Match their interests to our other residents and/or activity programs. Offer to demonstrate the activity schedule.*
 - *Have they visited anywhere else? If so, where? What did they like, dislike?*
 - *Take a personal interest in the prospect - be a resource.*
 - *Do not over-promise or paint too rosy a picture. Seniors have been around a long time and don't expect anything to fit perfectly.*

Information Gathering

- **Qualifying**
 - *Are they currently living in their own home? Do they rent? Are they receiving family support?*
 - *What resources do they plan to apply towards the monthly service fees?*
 - *Do they receive homemaker or home care services currently?*
 - *How soon is the prospect interested in making a move?*
 - *Who will be involved in making the decision?*

Presentation

- **Community Features**
 - *Represent the value of the social "lifestyle" offered. It is not simply a beautiful building, the amenities, services, and programs are essential to the overall value and it is the staff, residents, and management that make the community special. Especially communicate that our fees are all inclusive and not priced on levels of care or point systems.*
 - *Reassure them that they can expect no surprises and will receive the same bill every month.*
 - *Relate the community feature benefits to the prospect's needs and desires.*
 - *Anticipate questions from the information gathering stage.*

Presentation

- **Tour**
 - *Continue mirroring - always walk at a comparable pace to your prospect, open doors wide, and invite in as you back into the room.*
 - *Check the vacant rooms before showing for cleanliness. Turn on lights prior to tour. These units should be detailed daily.*
 - *Have your tour route planned so it flows comfortably and does not require extensive walking. Always be aware of where you are in relation to elevators, exits, and common areas.*
 - *Relate key points in your tour to the prospect's needs and desires.*
 - *Always interact with staff/residents and introduce the prospect when appropriate. Remind the staff before your tour to come up and introduce themselves.*
 - *When possible, schedule tours around activities to show a community benefit, avoid meal times and change of shift.*

Presentation

- **Knowledge**
 - *Know your community inside and out. Read the Family Handbook, monthly activity calendar. Know programs, services offered, unit types, sizes, prices, owners/sponsors.*
 - *Know your competition. Who are their owners/sponsors, management company? What is their service package, unit mix, pricing? Know what your program offers that the competition does not. Always respond to competition questions/comparisons in a positive, professional manner - REMEMBER, the competition does not have the #1 thing most people buy on - YOU!*
 - *Know the area. Our market is the surrounding community(ies) usually a 5 mile radius. In order to gain credibility and trust, it is essential that you be familiar with the area and key benefits - shopping, transportation, medical centers, etc. Also be sure to point out that many healthcare providers such as the physician, physical therapist, podiatrist come right to the home, so family wont need to take their loved ones out to many appointments.*

Presentation

- **During the tour**
- General Manager must be present, and come forth to introduce themselves. Let me do the tour alone, I will call you in if needed later.
- Be sure any wild residents are receiving 1:1 attention
- Make sure the programmed activity is happening – Reminiscence, word games, art project, current events, music. GM to run this if possible.
- Each nurses aide and activity director should come say Hi.
- Engage the other residents, show them what kind of caregivers we are, and will be to their loved one.
- Absolutely no staff members are to be seated during a tour.
- Say goodbye when we leave, and “we hope to see you again” or “I’m sure that your loved one will be comfortable here”. “I am available to you anytime.”

Closing

◦ **Confirming**

- End the tour in a private place where there is a table. Have a physician health status forms in a brochure package with you.
- Summarize your understanding of how the community meets the prospects needs/desires.
- Reinforce value-belonging.
- Leave a discussion of the cost to the end. “The cost is only relevant when you consider the benefits of the additional services and amenities that go with it. Let me explain.”

Closing

◦ **Overcoming Objections**

- The best sales people in the world make their sale after overcoming a minimum of five objections.
- Welcome objections, it is part of the confirming process. Objections provide the opportunity to gather more information and clarify needs. “Is there anything you’ve seen her that you are uncomfortable with?”
- Identify objections - the prospect is giving you an opportunity to provide solutions
- Overcoming objections is the process of developing a comfort level with the decision.

Closing

◦ **Overcoming Objections**

- Ask directed questions to let the prospect answer their objections - “Now that we established that your father is unsafe living alone, would you say that this community is just right for your needs?”
- Again, body language is important - show that you are genuinely interested in providing solutions by being attentive, seated forward, maintain eye contact. You can not establish trust and rapport with someone if you don’t look into their eyes when you talk to them.
- You have confirmed that the community meets the needs/desires of the prospect, provided solutions to their objections, the next logical step is to ASK for the deposit.

Follow-up

- “He who follows up best wins”
- **Assuring**
- If the prospect has left a deposit:
- It is essential to take them to the next step. Request the completion of the physician’s health status form within a given period of time. Try to set a follow-up appointment at this time, possibly for an assessment.
- If the prospect has not deposited:
- Inform them of the deposit process and create a sense of urgency through limited availability, if appropriate. Ask if there is any additional information they require or if they would like to schedule a time to come back for a tour with another family member. Try to set a follow-up appointment at this time.

Follow-up

• **Retention**

- If the prospect has left a deposit:
- This is a delicate time, residents and family will make the prospect question their decision once away from the community. Send a personal note to confirm our commitment and reinforce that this is the right decision. Invite to appropriate functions/activities, send move-in information, follow-up with regular phone calls.
- If the prospect has not deposited:
- Always send a handwritten follow-up note immediately following a visit to thank them for the tour. During your visit, mark down key interests on the RIF. Personalize your follow-up note as much as possible. Follow-up phone calls according to lead classification.