

FROM DISCOVERY TO DECISIONS

*Purpose Aligned Sales
Processes*

FROM DISCOVERY TO DECISIONS
Purpose Aligned Sales Processes

WHY YOUR WORDS ARE SABOTAGING YOU

*Inquiries are down
8%, but conversions
are up 5%—why?"*



WelcomeHome

Key Takeaways

- The **sales funnel is evolving**: Operators are shifting to prioritize **quality over quantity**, adapting to a more digitally savvy prospect and influencer while balancing efforts with traditional lead sources like **professional** and **non-professional** referrals.
- **Lead volume has stabilized** in the post-COVID new normal: Lower volumes are being offset by a stronger focus on **prospects already in the sales funnel**, driving better conversions and **keeping move-in volume steady**.

MONTHLY AVERAGE (2024 vs. 2023)

-8%	-7%	+2%
NEW INQUIRIES	INITIAL TOURS	RETOURS

Best Practice

- Leverage **retours** to re-engage prospects—**bring visitors back** to spark renewed interest. Use the **dwell time report** and **engagement-based automations** to stay connected with post-tour prospects.

Key Takeaways

- Industry **inquiry to move-in conversions improved** (+5%) over 2023, showing an increasingly efficient funnel.
- Most operators connect with new prospects **within 4 hours**, with top performers responding **in as fast as 20 minutes**. It's not just about speed—**adding personal touchpoints through calls and texts** can make a big difference in turning early leads into tours.

MONTHLY AVERAGE (2024 vs. 2023)

+5%	+1%	+4%
INQUIRY TO MOVE-IN	INQUIRY TO TOUR	TOUR TO MOVE-IN

Best Practice

- **Pre-Tour**: Use the connection stage to gain deeper insights into early leads. Understand how many leads your team is engaging with and identify why some may be closing earlier in the sales funnel.
- **Post-Tour**: Take advantage of the dwell time report and automations to effectively manage leads who are 30-90 days post-tour. Focus on those who show strong potential to move in, ensuring timely and strategic follow-ups.

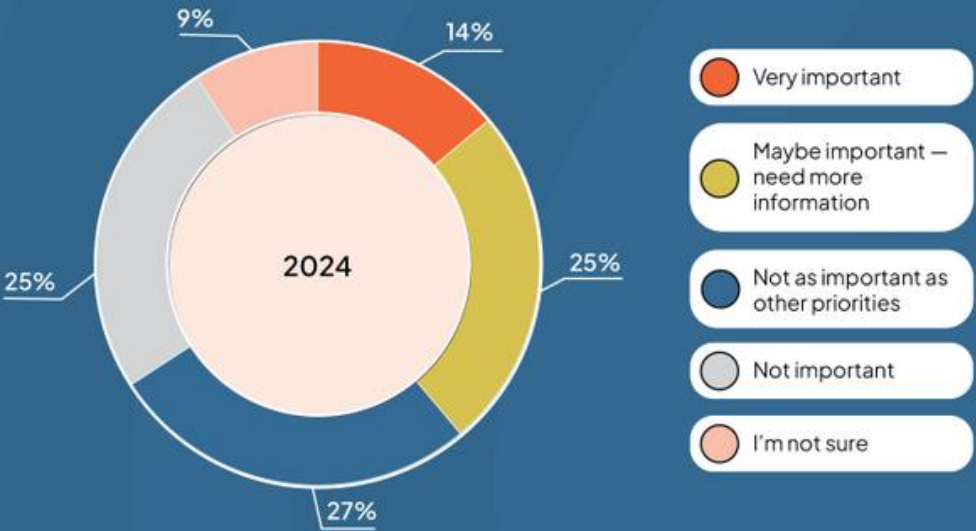


The most powerful differentiator isn't pricing or features...

Annual Benchmark Report | 2024

Impact of High-End Amenities How Important Are High-End Amenities?

While high-end amenities, such as multiple dining choices, concierge services, and a variety of fitness and entertainment options, are a factor for prospects researching senior living, more than half of survey respondents say these perks are not a top priority and other parts of the decision matter more. Messaging and sales strategies that make amenities the focus may fall flat with many prospects.



Not all call-outs are created equal. A focused, 40-minute call that results in an advance delivers far greater value than 40 quick calls that end in voicemail. Tracking both the time invested and the outcomes achieved provides a clearer picture of call-out quality.

Sales Activities per Community	Average per Month (per 100 Units)	Top 10%	Time & Effort Required by Salesperson per Activity	Prospect Demonstration of Intent to Buy	Likelihood of Advance Acceleration
Face-to-Face					
Initial Tours	7.7	15.9	★ ★ ★	★ ★ ★	★ ★ ★
Total Tours	10.7	17	★ ★ ★	★ ★ ★	★ ★ ★
Home Visits	2.4	4.4	★ ★ ★	★ ★ ★	★ ★ ★
Appointments	3.5	5.4	★ ★ ★	★ ★ ★	★ ★ ★
Event Attendance	8.9	16.8	★ ★ ★	★ ★ ☆	★ ★ ★
Prospect Centered					
Planning	57.6	346.4	★ ★ ☆	★ ★ ★	★ ★ ★
Creative Follow-Up	28.4	197.5	★ ★ ★	★ ★ ★	★ ★ ★
Voice-to-Voice					



WHAT DOES THIS MEAN FOR SENIOR LIVING?

- Discovery is more important than ever - **for both sides.**
- World-class discovery means investing time to **truly get to know** your prospects

“Thoughtful, two-way discovery will be a hallmark of successful senior living communities. The communities that prioritize learning about their prospects...will be best positioned to stand out and thrive.”

WelcomeHome 2024 Year In Review, Pg. 2



***“What if the only thing
separating you from success
is the quality of your
conversations?”***



FROM DISCOVERY TO DECISIONS
Purpose Aligned Sales Processes

**WE'RE NOT GOING TO
TEACH YOU TO CLOSE**



What if the only thing you had to do to differentiate yourself was to ensure that the person leaving your community or hanging up the phone said:

“I really mattered to them”



STOP SELLING AND START CONNECTING:

**To Be
Understood**

To Feel Safe

**To Believe in a
Better Tomorrow**



*Sales in Senior Living isn't
about closing the deal, it is
about opening a
relationship.*





Meet Alfred Johnson

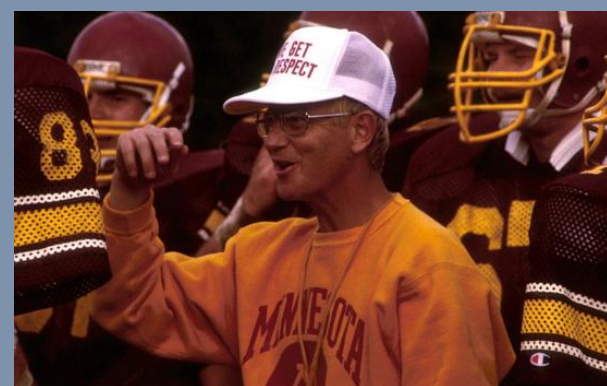
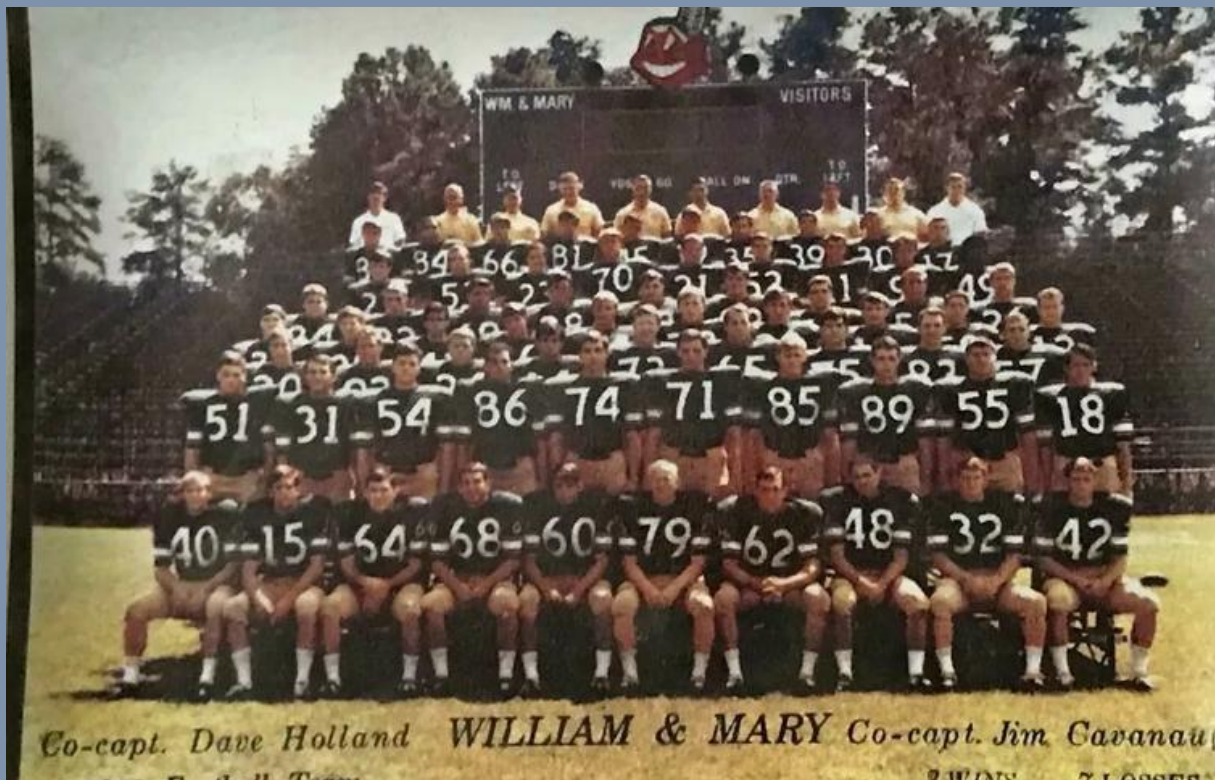
- *78-year-old African American man*
- *From Chicago's South Side*
- *A Vietnam War veteran, former high school history teacher & baseball coach.*
- *Needs to move into a senior living community due to his increasing needs for support in managing his Type 2 diabetes.*
- *His wife of 50 years, Evelyn, passed away two years ago*

EXERCISE: List 3 things that are important to him



FROM DISCOVERY TO DECISIONS
Purpose Aligned Sales Processes

THE L.I.S.T.E.N. FRAMEWORK



Motivation determines what you do...

A collegiate coach best known for his tenure at Notre Dame, but has an impressive pattern of creating successful football programs that were once struggling.



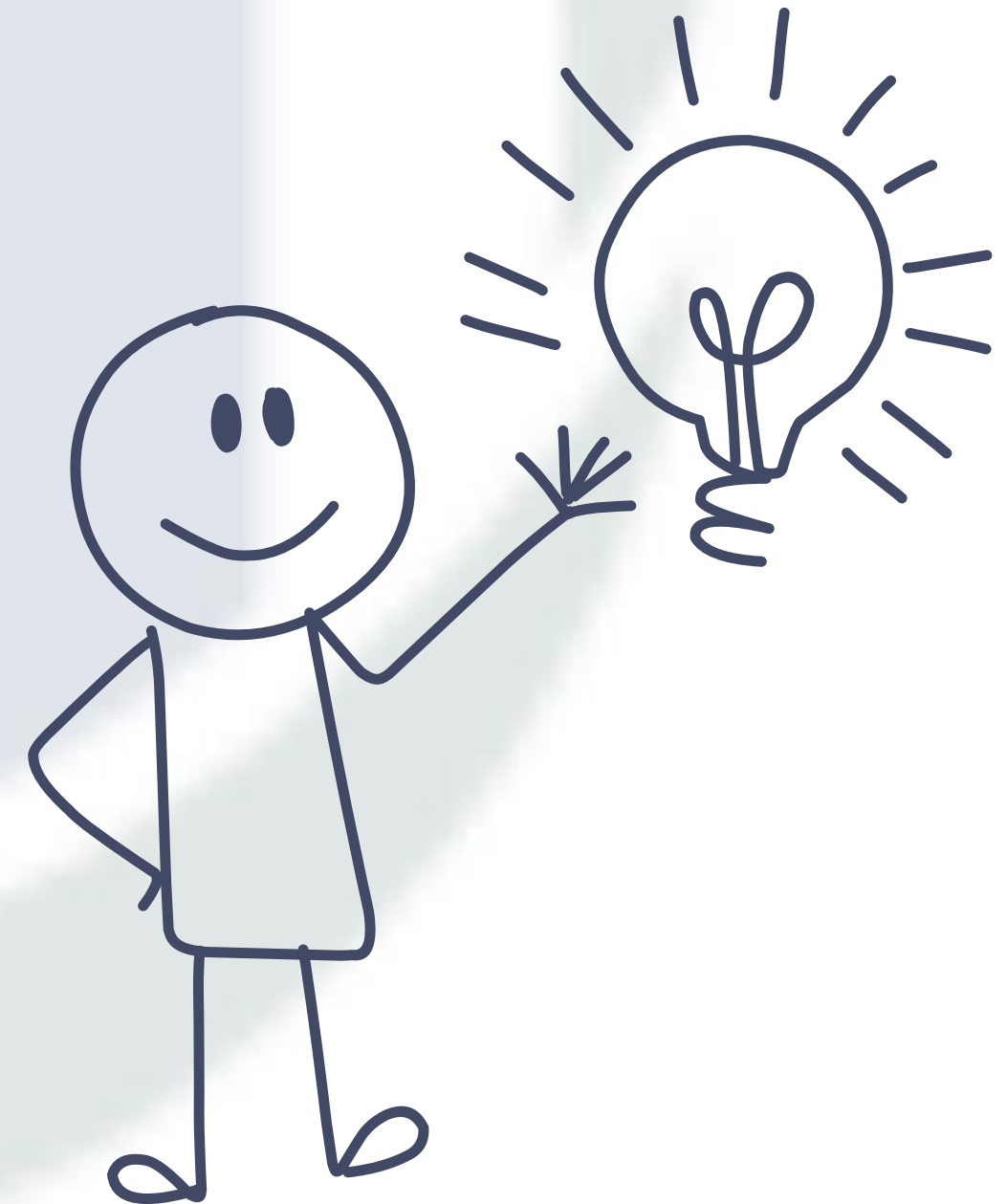
HOW TO CONNECT FASTER & MORE EFFECTIVELY

- People buy with **emotion first**, logic second
- The best sales people **connect on values first**, details second.
- Ask Better **Questions**
- You Need to ***L.I.S.T.E.N.***



THE COURAGE TO BE CURIOUS

- L**earn Background
- I**nvoke Storytelling
- S**eek Emotional Drivers
- T**rack Value Patterns
- E**xplore Alignment
- N**avigate Next Steps



THINK OF *L.I.S.T.E.N.* AS A SHIFT FROM...



FROM DISCOVERY TO DECISIONS
Purpose Aligned Sales Processes

THE CONVERSATION THAT CONVERTS



The **quality** of your lead
base is tied directly to the
quality of your
relationships.

— ... —



LEARN BACKGROUND

Gather contextual and foundational information to understand the individual or situation comprehensively

- *Questions that explore feelings, beliefs, and values spark emotional responses **AND** emotional responses build trust.*
- *The best listeners aren't just listening...they are guiding the conversation with curiosity and emotional courage*



LEARN BACKGROUND: Ask Better Questions



No

- Does your loved one want to move?
- Do you have any questions for me?
- Would you like to leave a deposit today?
- Have you toured other places/communities?



Yes

- What are you most excited or nervous about?
- What has been the most difficult part of this journey so far?
- If we could support you in making this easier, what would that look like?
- Of the communities you have toured, what stood out and what felt like it was missing?



LEARN BACKGROUND: Ask Better Questions

Imagine helping Alfred Johnson carry the weight of his decision to move into a senior living community. It's not just about the physical act, but the emotional relief and connection it creates.

Before: "Our community offers spacious rooms and 24/7 medical support."

After: "Mr. Johnson, I understand that finding a community that respects your rich history and allows you to continue pursuing your passions are important to you. Let's explore how we can make that happen."



From Selling Features to Creating Meaning

We have Transportation Services

We help people keep their independence even when driving becomes harder



We have great food...3 meals a day

Mealtimes feel like home again—connection, laughter, and comfort food.



We have staff on-site 24 hours a day

Someone is always here to help your loved one feel safe and supported, even at 2 am.



INVITE STORYTELLING

Encourage open sharing of personal experiences to build trust and gain deeper insights.

***Good questions lead
to storytelling...***



ALFRED'S TRUE STORY



EXERCISE:
UPDATE YOUR LIST OF 3
THINGS THAT ARE
IMPORTANT TO HIM

Key aspects of Alfred's life story:

1. Vietnam War veteran **and combat medic**
2. Former high school history teacher and baseball coach
- 3. Played minor league baseball**
4. Married for 50 years to Evelyn (deceased)
- 5. Father to Marcus and Tanya**
- 6. Avid golfer and organizer of charity tournaments**
7. Type 2 diabetes patient seeking additional support
8. Strong ties to Chicago's South Side community
- 9. Passionate about African American history and culture**
- 10. Enjoys sharing stories from his varied life experiences**
- 11. Values education and lifelong learning**
- 12. Concerned about cultural sensitivity in senior living**
- 13. Seeking opportunities for continued community involvement**
- 14. Enjoys soul food and traditional African American cuisine**



FROM DISCOVERY TO DECISIONS
Purpose Aligned Sales Processes

COURAGEOUS CURIOSITY



SEEK EMOTIONAL DRIVERS

Identify underlying emotions and motivations that influence perspectives and decisions

In one study, sales managers and reps went through a training program to boost their emotional intelligence. As a result, total sales revenue went up by an average of 12%.

At L'Oreal, sales agents selected on the basis of certain emotional competencies significantly outsold salespeople selected using the company's old selection procedure.

On an annual basis, salespeople selected on the basis of emotional competence sold \$91,370 more than other salespeople did, for a net revenue increase of \$2,558,360.

Salespeople selected on the basis of emotional competence also had 63% less turnover during the first year than those selected in the previous way

The L'ORÉAL logo is displayed in a bold, black, sans-serif font. The letters are evenly spaced and the overall style is clean and professional.

***This is the business case for
emotional intelligence***



TRACK VALUE PATTERNS

Observe recurring themes and values to understand priorities and align communication effectively



Why Values Matter:

By leading with values, you won't just increase sales; you'll create lasting impact.

What is the currency of sales?

TRUST.



TRACK VALUE PATTERNS

Observe recurring themes and values to understand priorities and align communication effectively

Values to Help Reclaim

Relationships	Health	Creating	Spirituality
Family	Kindness	Volunteering	Independence
Friends	Challenge	Responsibility	Learning
Love	Teaching	Activism	Personal Growth
Inner Harmony	Making	Pleasure	Trust



ALFRED'S VALUES & GUIDING LIGHTS

1. Vietnam War veteran and combat medic
2. Played minor league baseball
3. Married for 50 years to Evelyn (deceased)
4. Father to Marcus and Tanya
5. Type 2 diabetes patient seeking additional support
6. Enjoys soul food and traditional African American cuisine
7. Former high school history teacher and baseball coach
8. Passionate about African American history and culture
9. Enjoys sharing stories from his varied life experiences
10. Values education and lifelong learning
11. Concerned about cultural sensitivity in senior living
12. Seeking opportunities for continued community involvement
13. Avid golfer and organizer of charity tournaments
14. Strong ties to Chicago's South Side community



Relationships

Teaching

Volunteering



FROM DISCOVERY TO DECISIONS
Purpose Aligned Sales Processes

VALUE-BASED FOLLOW UP



EXPLORE ALIGNMENT

Assess how individual goals and values align with broader objectives or shared missions

Match the Community Story with the Prospect's Story.

NET PROMOTER SCORE: How they feel when they leave is how likely they are to move-in/refer to you

Not the right fit, budget is not right, still serving them



NAVIGATE NEXT STEPS

Collaboratively determine actionable steps to move forward in a meaningful and productive way

Why Follow Up is Everything

Personalized Communication Wins

The more you uncover in discovery about the prospects desired outcomes, family's goals and the roadblocks they have to overcome the more personalized and valuable your follow up can be.

Keep the Emotional Connection Alive

Following up with a simple, I know you had an appointment today or today was going to be a hard day and I wanted to check on you text or call, the deeper the emotional connection will be to your community. Or even something as simple as a unique gift.

Continued Value Add

Follow up becomes stale when you know nothing about your prospect. Your follow up calls or contacts become generic and offer no value.

It is hard to reengage in a meaningful way without setting the precedent during discovery.



Download The L.I.S.T.E.N. Framework & The Values-Based



The L.I.S.T.E.N. Framework
"Discovery is not a chance
into someone's life."

The Values-Based Sales Challenge
Your 7-Day Guide to Purpose-Driven Sales
Conversations in Senior Living

Learn Background
Involve
See
Track
Expl
Navi



Practice Active
Listen more. Reflect
personal the prospect
with, "What I heard
you say is..."

Track Value
tion, write down 3 values
heard.
pendence, connection,
ace of mind.

Reinforce the
ship
en note, voice message,
w-up that acknowledges
ghful they said.
Because being
makes people feel seen.

Challenge
serve one of your discovery
provide feedback using the
N. framework.

about creating space for
ful decision of their lives.

tmc.llc.2024@gmail.com 682.593.2034 www.linkedin.com/company/thementoringcompany The MENTORING Company



Aaron Fish

afish@trestlehc.com
682.593.2034



Erin Thompson

erinthompson@aspireformorewitherin.com
251.605.7408

**Which one
are your
prospects
experiencing?**

*One is a conversation.
the other is a
connection. Which do
you want to create?*



“People want to feel helped, hugged, and heard. Be the person who gives them all three.”



FROM DISCOVERY TO DECISIONS

Purpose Aligned Sales Processes

Learning Objectives

- *Understand the Importance of Values and Purpose in the Sales Process:*
- *Learn Techniques for Uncovering Values:*
- *Ask Effective Questions:*
- *Apply Values-Based Selling Strategies:*