

THE ONLY ADVANCED CONFERENCE OF ITS KIND!

20TH
ANNIVERSARY

THE **2016** ADVANCED SALES & MARKETING SUMMIT FOR THE SENIOR HOUSING, ASSISTED LIVING AND NURSING INDUSTRIES

"WHAT IS AN EVIDENCED-BASED SALES AND MARKETING TEAM?"

JUNE 27 & 28, 2016

JUPITER BEACH SPA AND RESORT

JUPITER BEACH, FLORIDA



"As a CEO who attends this Conference, I can attest to the exceptional value of what we learn and the work of Tony Mullen and others who have helped dramatically raise the bar in selling and revenue creation for our field."

DONALD THOMPSON, CEO,
Senior Living Communities



FEATURING:

PAUL SMITH, AUTHOR, SELL WITH A STORY

LEARN FROM THESE PROS:

STEPHENIE HALDANE, VICE PRESIDENT,
STRATEGIC SALES DEVELOPMENT, VALIDUS SENIOR LIVING

CASEY JACKSON, DIRECTOR,
THE INSTITUTE FOR INDIVIDUAL AND ORGANIZATIONAL CHANGE

GREG JOYCE, PRESIDENT, LEGACY RETIREMENT

CINDY LONGFELLOW, NATIONAL DIRECTOR OF SALES AND MARKETING,
JUNIPER COMMUNITIES

SUE MCCLURE, PRESIDENT, GLYNN DEVINS

NICOLE MINITIENS, DATA ANALYSIS & INSIGHTS MANAGER, G5

STEVE MORAN, FOUNDER, SENIOR HOUSING FORUM

KATIE ROPER, VICE PRESIDENT OF SALES AND MARKETING, CARING.COM

DR. MARGARET WYLDE, PROMATURA GROUP

GAIN FROM THESE TOPICS:

- ❓ Leads: Why Volume and Velocity Are Inferior
- ❓ Reinventing the First Call
- ❓ The Truth About Websites
- ❓ Why Authentic Stories Build Relationships
- ❓ How Culture Causes Great Results

CORPORATE SPONSORS:

- Caring.com
- G5
- Moore Diversified Services
- One On One Service to Seniors
- Roche Associates
- Senior Housing Forum
- Sherpa

CONFERENCE HOTEL IS 25 MINUTES FROM THE WEST PALM BEACH, FL AIRPORT

TESTIMONIALS ABOUT PAST CONFERENCES

“As a long time attendee, we get great value from this Conference for our Sales and Operational teams and find results are evident company-wide from what we learn.”

— **Anja Rogers**, COO, Senior Star

LETTER FROM THE CONFERENCE CHAIRMAN

Twenty years is a journey! When we first started this conference, it was focused almost exclusively on market research, because assisted living development was in its heyday. Now, the industry is struggling to maintain average occupancy of 88% in assisted living (it was 88.3% at the end of March 2016), and the overall growth rate in assisted living occupied units over the last two years has dramatically slowed and occupancy will continue to fall. There are several reasons for this, but the most important one by far is the inability of the industry, especially the executives, to prioritize and make the sales position into an executive level position in pay, selection, training, development and prestige. In many ways, the sales director position is as important as the executive director position, and the two positions must work in a true partnership to make 100% occupancy or maximum revenue a reality. Yet, in over 95% of communities, the sales director makes only 60% of what the executive director makes, and has far less experience (in terms of years selling) than an executive director has (in terms of years managing/leading). This simply does not make business nor economic sense when just one additional unit of occupancy (over a year) adds one million dollars of value for a typical assisted living property (below 95% average occupancy), and about \$750,000 in value for a typical independent living unit.

Due to the very high absolute dollars a customer generates, and the very low incremental cost of one more resident to operations, the cash flow from just one unit will pay for a professional sales director and add tens of thousands a year to the bottom line of a community. Yes, just one unit! Now, if five or more units are needed to be filled in a typical assisted living community (which is indeed the case today), there is over \$250,000 of annual cash flow to add to the bottom line, and almost \$200,000 for independent living. In 95% of communities today, there are millions of dollars to add to annual cash flow. It is mind boggling that so few companies act on this stark reality.

This year, in addition to our normal focus on advanced sales methods and systems, which produce above average results, we will take a hard, evidence-based look at what is working on websites and why. Most companies are now close to having 50% of all leads come from the internet. Yet, the percentage of move-ins from internet leads is far lower.

I am very grateful to G5 for agreeing to work with me to construct a framework by which we can report an apple to apple comparison of key results and metrics from websites of a number of different companies. This framework, and the distribution of responses, should give the industry far better insight into what is really working and why with regard to conversion of interest from web leads.

You already know if you read this annual letter, I continue to see massive headwinds for occupancy in assisted living, memory care and now in independent living as well. The absolute amount now being charged is causing far fewer prospects to see the value than 20 years ago, and the amount of competition in most markets continues to put real pressure to discount. In addition, the vast majority of communities focus on a volume and velocity approach (how many leads can I produce each month, and how fast can I get someone to move in). However, the much more effective approach used by the top sales professionals is an interviewing and internal motivation approach, which when mastered, leads to a doubling of the move-in ratio (visits to move-ins).

I still see the risk of a massive, unexpected shock to our economic and social systems due to the unprecedented debt we have, the annual loss/deficit we continue to run and a completely dysfunctional political and governmental system. However, those who implement what is taught at this conference will have the highest occupancy rates in the industry, despite whatever is going on around them.

We are back at the beautiful Jupiter Beach Resort and Spa on the ocean, with great sites and shopping within five minutes. I expect the weather this year in June to be much better than November!

I am grateful to all of you who continue to come each year, as it is the only way to persist in the hardest part: execution. Advanced knowledge is only a small part of the equation, executing is what separates the great company from the average.

Do you know of any other industry where you can do such good for someone over such an extended period of time?

ANTHONY J. MULLEN, CONFERENCE CHAIRMAN

CONFERENCE AGENDA:

DAY ONE

8:30 – 9:00 AM

**CONTINENTAL
BREAKFAST
7:30 – 8:25AM
SPONSORED BY
MOORE
DIVERSIFIED
SERVICES**

KEYNOTE SESSION

9:00 – 10:00 AM

BREAK



10:00 – 10:30 AM

10:30 – 11:30 AM

11:30 – NOON

LUNCH



NOON – 1:25 PM

With Optional
Topic Discussions

**BOX LUNCH
SPONSORED BY
G5**

UNDERSTANDING WHAT IS REALLY IMPORTANT AND WHY IT WILL NEVER CHANGE

PRESENTER: ANTHONY MULLEN, PARTNER, JOURNEY TO MASTERY AND CONFERENCE CHAIRMAN

Mr. Mullen will review many of the empirical findings which undergird everything taught at this conference, and why only those who commit to master execution are the few who produce outstanding results which are sustainable. All of the empirical findings originate from understanding who the best customers are and how they approach and interact with you and the other communities which they investigate. Since 95% of prospects are not close to being ready to move when they first inquire, how you prioritize and choose which prospects to engage with becomes a critical element of upper quartile results. Why and how you approach and engage with prospects ultimately separates the best professionals from the average. He will also review the new scientific evidence for why the “volume and velocity” approach to leads, which is used by almost all companies in the field, is not supported by the evidence as the most effective approach.

USING STORIES AT EACH STAGE OF THE RELATIONSHIP: WHY AUTHENTIC STORIES CHANGE MINDS

PRESENTER: PAUL SMITH, AUTHOR, SELL WITH A STORY

The most overlooked truth of what we do is that our prospects initially do not trust us at all, because they do not know us, nor believe we have their best interest at heart. We are simply lumped into the great morass of “sales people trying to pressure us and sell us something”. This truth also accounts for why so few people are interested in coming for a visit and simply want to get information on the website or sent to them.

Stories, when they are compelling, authentic and short, can break this reality down faster than anything else, especially a compelling story that captures who you are and what you offer that resonates with prospects. Mr. Smith is back with a completely new presentation, which applies the science and art of short, authentic stories to each stage of the relationship process. There are only a few ideas which produce outstanding results; mastering authentic stories is one of them!

HANDLING THE FIRST CALL: THE WHY AND THE HOW OF MOTIVATIONAL INTERVIEWING

PRESENTER: CASEY JACKSON, PRESIDENT,
INSTITUTE FOR INDIVIDUAL AND ORGANIZATIONAL CHANGE

Last year, Mr. Jackson gave an outstanding presentation on the science and art of Motivational Interviewing (MI), which is the foundational principle of the advanced relationship approach of this conference for the last ten years. Mr. Jackson was invited back due to his position as a leading, national expert in MI, as well as his work in the senior housing and care field.

We have challenged him to do a workshop where he will demonstrate how he would handle the first call with a prospect and a subsequent call. He will then critique his own work to demonstrate how it could have been improved.

The most difficult aspect of MI is giving up control and avoiding the “telling” response, because it is so ingrained in our DNA and we feel pressured to produce immediate results. The MI approach produces better sales results, but you must practice it in order to master it.

WHAT WE DO TO OPERATE AT 99% OCCUPANCY CONSISTENTLY

PRESENTER: GREG JOYCE, PRESIDENT, LEGACY RETIREMENT

Mr. Joyce committed to a Motivational Interviewing Approach ten years ago, and for the last 5 years has operated at 99% occupancy. He will describe in detail three of the big decisions he made that apply to any company or any community, which seeks to use this knowledge to cause a sustainable change in results:

1. Having the right number of sales associates,
2. paying and training properly,
3. driving the MI approach to all areas of the company.

1:30 – 2:00 PM

CRAFTING AN AUTHENTIC STORY TO INTRODUCE YOURSELF AND YOUR COMMUNITY'S PURPOSE

PRESENTER: PAUL SMITH, AUTHOR, SELL WITH A STORY

The earliest opportunity to connect and make a memorable first impression is when you introduce yourself and your community to someone. This is particularly effective when working in the professional referral network, but will also be helpful in your phone calls and visits with prospects. People desperately want to know why you are different. In many cases, the only difference between most communities is you.

Using a short but compelling story at this opportunity is often what can spark the beginning of an authentic relationship. Why? Stories are remembered about seven times more than facts and everyone wants to hear a good, authentic story instead of a boring recitation of what you do and why your community is great.

2:00 – 3:00 PM

A SERIOUS, EVIDENCE-BASED LOOK AT CONVERSION OPTIMIZATION OF WEBSITES IN THE INDUSTRY

PRESENTER: NICOLE MINITIENS, DATA ANALYSIS & INSIGHTS MANAGER, G5

This session, the first of its kind that we know to have this level of uniform detail and evidence, will display the range of results from a representative sample of websites of professionally managed communities in the senior housing and care field.

Conversion Rate Optimization (CRO) refers to the process of what percentage of prospects go from knowing the site in general, to specifics, to filling out an inquiry form, to visit/tour, to move-in; and what are some general factors that increase the percentages.

There is much misinformation and hype in this area and this session seeks to help the industry begin the process of coming together to agree and properly define the definitions and metrics so that all can maximize the value of their websites, as well as what general factors lead to better conversion rate optimization results. While the web continues to grow in importance in terms of the volume of leads, it has become increasingly difficult to manage these leads and prioritize them.



BREAK

3:00 – 3:30 PM

**SPONSORED BY
ROCHE
ASSOCIATES**

3:30 – 4:15 PM

HOW A GREAT CULTURE CAUSES HIGH OCCUPANCY

PRESENTER: STEVE MORAN, FOUNDER, SENIOR HOUSING FORUM

Mr. Moran has spent many years building one of the largest sites on the web devoted to helping professionals better lead, manage, market and sell in their various roles. He has studied and interviewed many of the leading companies and especially seeks out those whose performance is truly outstanding. Very similar to the work of this Conference and our own quest for unique excellence based on advance-level knowledge and execution, he has uncovered a handful of companies whose performance with high occupancy and low employee turnover, teaches the importance of having an authentic culture based in objectively putting employees and residents first in that order. He will detail the specific issues he has uncovered that make the difference in these companies.

4:15 – 5:00 PM

CAN A CRM HELP YOU SELL BETTER?

PRESENTER: STEPHANIE HALDANE, VICE PRESIDENT, STRATEGIC SALES DEVELOPMENT, VALIDUS SENIOR LIVING

For the last several years, we have discussed Sherpa, the CRM system that was designed to disrupt the status quo by being an expert sales coach, as well as an advanced sales system based in an interviewing and prospect centered (self-motivational) approach.

In addition, it performs all the typical prospect relationship management functions and then some. Now, we put it to the test from a sophisticated company who has used it for a year.

How well does it teach and begin to change habits of behavior? How difficult is it to use? Is it producing an increase in move-ins? This is your chance to hear from a company that has put it through the paces.



COCKTAILS

6:00 – 7:00 PM

**SPONSORED BY
ONE ON ONE
SERVICE TO
SENIORS AND
SHERPA**

DAY TWO**OPENING SESSION**

8:25 – 9:35 AM

**CONTINENTAL BREAKFAST
7:30 – 8:25AM**

9:35 – 10:10 AM

BREAK

10:10 – 10:30 AM

10:30 – 11:05 AM

11:05 – 11:40 AM

11:40 – NOON

END CONFERENCE

READING THE TEA LEAVES OF RESEARCH AS GUIDELINES FOR CREATING CUSTOMERS**PRESENTER:** DR. MARGARET WYLDE, PROMATURA GROUP

For over 30 years, Dr. Wylde has been on a journey to better understand customers and to help the providers in our industry create, market, and sell the lifestyle that people want. Taking pieces (the leaves in the bottom of the cup) from large scale statistically valid research programs, studies of satisfaction and feeling at home, and personal conversations with customers and those who will never become customers, Wylde has distilled some key lessons and guidelines to help you deliver, measure, and benchmark how well you are delivering and selling what your customers want.

One of the most important lessons learned is the intimate and necessary connections that must exist between all components of the community, especially that of marketing and sales. These connections, however, must begin with the head of the company and must be felt and delivered by every employee

BUILDING A BETTER ONLINE REPUTATION**PRESENTER:** SUE MCCLURE, PRESIDENT, GLYNN DEVINS

Seniors and their family members are increasingly commenting on their experiences with senior living communities online – as are your associates and local businesses in your community. And the conversations are taking place whether or not you monitor or engage with feedback online.

This session will help you identify which directory listing senior housing providers should claim and invest time in updating. Ms. McClure will also discuss how to overcome negative feedback by crafting and delivering respectful responses, as well as describe helpful dos and don'ts for increasing positive online reviews.

UNDERSTANDING THE METRICS TO BUILD AN EFFECTIVE SALES DASHBOARD**PRESENTER:** CINDY LONGFELLOW, NATIONAL DIRECTOR OF SALES AND MARKETING, JUNIPER COMMUNITIES

Juniper has been an evidence-based company for many years and has developed an effective sales and marketing dashboard from which the company executes on a daily and weekly basis. While dashboards have been discussed for many years, few companies in our field have taken the time to actually put them in place so they can be used at the community level to guide the right choices and the right behaviors.

A SIMPLE AND EFFECTIVE APPROACH TO BUILDING RELATIONSHIPS WITH GOOD WEB CONTENT**PRESENTER:** KATIE ROPER, VICE PRESIDENT OF SALES AND MARKETING, CARING.COM

Most stand-alone communities and those within companies with less than 10 communities struggle to update their websites and to have good, ongoing content for their email and social media channels. Caring.com, as a leading vendor serving the industry, seeks to help solve this dilemma as part of their commitment to provide value.

Having informative content on a regular basis is one of the most important tools for building a relationship with prospects based in trust and likability. Your content, for most prospects, is who you are until they interact with someone at your community. Therefore, you will be judged, at least in part for those who come to you by way of the web, by how effective and compelling your content is.

IS IT POSSIBLE TO HAVE A BRAND IN THIS INDUSTRY?**PRESENTER:** ANTHONY MULLEN, CONFERENCE CHAIRMAN

Our industry is highly fragmented and the purchase environment is usually a "one time purchase" very late in life that is viewed as negative by many (and only highly positive by about 12%) of the potential market. So is it possible to have a brand, and if so, is it necessary to be an outstanding performer? What do we mean by a brand? How is a brand different from word of mouth? Has that concept changed in the age of social media? What exactly is important in this area and how can we achieve what is important?

BEST PRACTICE SEMINARS, INC.
C/O CONFERENCE MANAGEMENT
3559 DELLWOOD AVE.
JACKSONVILLE, FL 32205

**PRESORT
FIRST CLASS
U.S. POSTAGE
PAID**

**THE 2016 ADVANCED SALES
& MARKETING SUMMIT FOR THE
SENIOR HOUSING, ASSISTED LIVING
AND NURSING INDUSTRIES**

JUNE 27 & 28, 2016 JUPITER BEACH SPA AND RESORT JUPITER BEACH, FLORIDA

"As a CEO who attends this Conference, I can attest to the exceptional value of what we learn and the work of Tony Mullen and others who have helped dramatically raise the bar in selling and revenue creation for our field."

DONALD THOMPSON, CEO,
Senior Living Communities

CONFERENCE — REGISTRATION FORM

Please register the following delegate for "The 2016 Summit"

Mr./Mrs./Ms.: _____

Title: _____

Organization: _____

Address: _____

City/State/Zip: _____

Phone: _____

Email: _____

(for registration confirmation only)

Payment enclosed (please make check payable in U.S. funds to Best Practice Seminars, Inc.)

Please charge by credit card (please print neatly):

VISA MasterCard American Express

Card # _____

Exp. Date _____

Signature _____

FOR OFFICE USE ONLY:

DATE RECEIVED: _____

AMT. PAID: _____ METHOD: _____

3 EASY WAYS TO REGISTER:



FAX THIS FORM TO: 800-713-1235 (secure line)



OR MAIL TO: BEST PRACTICE SEMINARS, INC.
C/O CONFERENCE MANAGEMENT
3559 DELLWOOD AVE.
JACKSONVILLE, FL 32205



OR SCAN AND EMAIL THIS FORM TO:
bestpracticeseminars@gmail.com

CONFERENCE VENUE:

Jupiter Beach Resort and Spa

5 North A1A

Jupiter, FL 33477

800-228-8810

Special Hotel Rates are Available Until June 10, 2016.

REGISTRATION FEE:

\$1,450 per person. **\$1,295** if received prior to **June 10, 2016**.

Discounts are available for 6 or more attendees from the same company. Please call **610-853-9801** for rates. Hotel rates are separate. Please make hotel reservations early. **HOTEL WILL SELL OUT!** Please do not send the conference registration form to the Hotel, but to the fax number or address for Conference Management listed above.

HOTEL INFORMATION AND CANCELLATIONS:

To secure reservations at a special group rate of **\$189** per night at the Jupiter Resort call **800-228-8810** and **ask for the group rate ACAM 2016 / Best Practice Seminars**. You must call by June 10, 2016 to get the group rate. The hotel will sell out, so please make hotel reservations early! Should you be unable to attend, a refund less a **\$195** administrative charge will be made for cancellations received in writing before **June 10, 2016**. No refunds will be made for cancellations after this date. Substitutions may also be made up to **June 20, 2016**.