BROOKDALE UNIVERSITY OF SALES

EST. 2019

Sales Success

WORKBOOK

Using this Workbook

Discover, Do, and Discuss

In this workbook, you'll find three icons that represent the key information, activities, and conversations you'll Discover, Do, and Discuss during your Brookdale University of Sales onboarding program. Each icon directs your attention to important concepts, conversations, processes, and tools to remember and apply.

TIP: Because of the dynamic nature of your role, we encourage you to work at your own pace within that schedule.

DISCOVER: The Discover icon denotes key information and concepts in the lesson. Studying this material enables you to complete the activities in the Do section that follows.

DO: Activities in this section apply the material presented in the Discover section. You'll complete most of the activities independently and share the work with your DDS. Because your onboarding is a priority, take the initiative to show your leaders the work you're doing. Occasionally, you'll post photos of your completed activities to the Brookdale Sales Facebook group to get ideas and feedback from peers.

DISCUSS: When you see the Discuss icon, you'll engage in one-on-one, structured conversations with your DDS and ED. The majority of these conversations will focus on feedback and suggestions for improvement on the work you've completed in the workbook. Your leaders will also share personal insights and success stories to inspire and challenge you. Take advantage of these discussions to ask your leaders questions and share your stories too.

As you finish the activities in each section, review your answers with your ED and/or DDS. As they review your work, ask for and offer insights or recommend changes. Partnering with them to ensure you have finished the activities accurately builds your sales skills and develops your relationship with these important leaders and partners in your community.

"A picture is worth a thousand words.
An icon is worth twice as many."

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BROOKDALE UNIVERSITY OF SALES

EST. 2019

TELLING YOUR *Community* STORY

"When things aren't going your way, stop and remember why you are doing this. If you need help remembering, then go spend a few minutes with one of your current residents—they always have a way of lifting your spirits and renewing your energy."

—Sales Associate, Brookdale Alexandria

After completing Telling Your Community Story, you'll be able to:

- List the responsibilities of key leaders in your community and their preferred ways to collaborate
- Describe the Better and Different Programs in your community and how they benefit residents
- Share insights about life as a resident in your community
- Tell stories about your community from various perspectives
- Summarize the uniqueness of your community
- Partner with key leaders and associates to drive sales success

I'm Curious

During the first days of your onboarding, you'll probably have lots of questions and some specific needs. That's great! Use this activity to record your questions to help us provide the information and support you need for a bright start. We've provided a few questions to start your list.

After you've completed this activity, discuss your questions with your ED and DDS. They'll provide answers you need or locate the associate who can.

BROOKDALE
SENIOR LIVING

WHO:

Who do I report to?

WHAT:

What training will I receive?

WHERE:

Where do we gather for community meetings?

WHEN:

When and how am I evaluated?

HOW:

How do I order supplies?
How do I get access to all of the information systems I need?
How do I get access to the Brookdale Sales Facebook page?

Get to Know Your Executive Director

Name of Executive Director: ______________________________

As a Sales Associate, you'll work closely with your Executive Director in a multitude of ways. To discern how you'll work together to drive sales success in your community, take turns answering the questions below. Place your responses on the Venn diagram on the next page to graphically illustrate the uniqueness of your roles and where they complement each other. Feel free to add more information to the diagram. The more you know, the better!

Your Roles

1. Tell me about the purpose of your role.
2. What do you most love about your role?
3. What do you see as the purpose of my role and why does it exist?
4. How do I best support the community and your role?

Working Together

1. What is your preferred method of communication?
2. What day and time can we schedule our weekly sales meeting?
3. In what ways have you worked with a Sales Associate during a prospective resident's community visit? What would you like to continue to do?
4. In what new ways might we collaborate?
5. How do we work together to transition families from the Customer Journey of sales to becoming a resident?
6. How will we best partner with our DDS to drive success?

Your Community

1. What is the history of our community?
2. Who are the key residents, associates, and external partners in the community and outside the community?
3. I need to interview residents and influencers. Who would you recommend?
4. How do you suggest I get to know the residents and their families?

Please share one story that illustrates why you do what you do.

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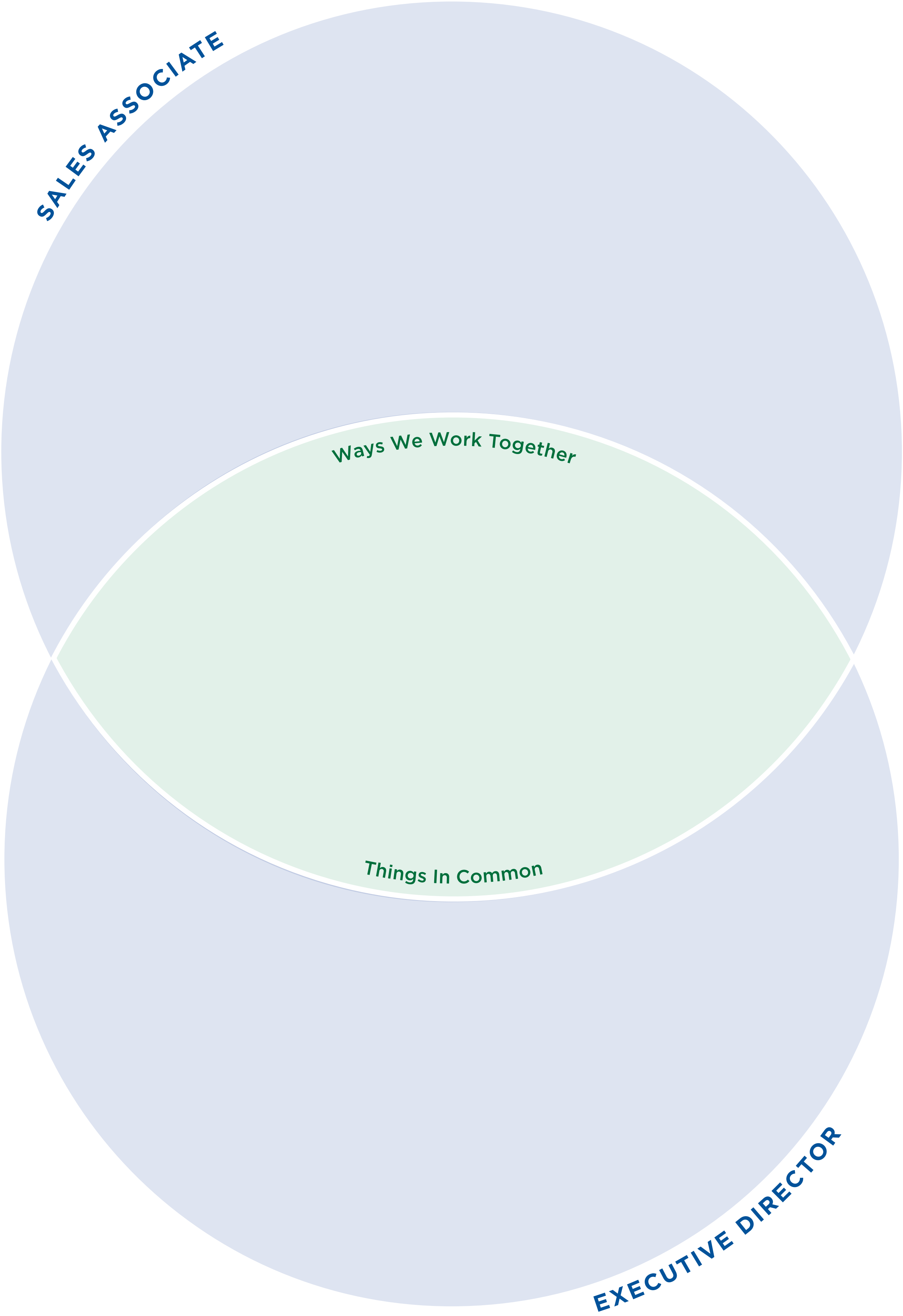
SALES ASSOCIATE
Ways We Work Together
Things In Common
EXECUTIVE DIRECTOR

Partnering with the Business Office Manager

Name of Business Office Manager: ______________________________

The Business Office Manager (BOM) or Business Office Coordinator (BOC) in your community helps residents say, "Yes!" to Brookdale by providing options for prospective residents to cover the costs for their senior living solution.

To prepare for your interview with the BOM, visit Brookdale.com and search for specific details about Brookdale's financial solutions. Think like a prospective resident or their family member as you search.

What information would you need to know if you were considering senior living?
What questions would you have?
What concerns would you have?

Write down the information you found and the questions that developed as you searched the site.

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"Sales is not just a one man job, keep your team involved to help highlight each department's better and different Brookdale qualities."

—Sales Counselor, Brookdale Kenmore

Ask your questions along with the questions listed below during your upcoming interview with BOM.

Interview Questions:

1. Tell me about your role.

2. What is your role during a prospective residents community visit? During a move-in?

3. How can I best partner with you?

4. What are the common challenges you have had with new move-ins?
What can we do to remove those barriers?

5. In what ways do you support residents and their families after they move-in?

6. How do we help residents cover the costs for senior living?

7. What is the CARE Program? How does it benefit our residents?

8. How do you engage residents through the six dimensions of Optimum life?

9. Share a story that illustrates why you do what you do.

Dining Services

Healthy Meals for Our Residents

Name of Dining Services Director:________________________________

Arrange a time to share a meal with the Dining Services Director and try a few signature dishes during your meal. Use this menu of questions to learn the role of the Dining Services Supervisor, the uniqueness of our dining services, and the potential ways you can work together during community visits and home visits.

Appetizers:

1. Tell me about your role here.

2. What do you like about it?

3. What does a typical day and week look like for you?

Main Course:

1. What special events do we feature in dining services? What are the most popular meals?

2. How do we customize meals for our residents?

3. In what ways have you partnered with the Sales Associate in the past during a prospective resident's community visit? Is there a specific table designated for lunch/dinner visits?

4. How far in advance should I let you know that I will have a guest at mealtime?

5. What signature programs do we feature in our community's dining services department?

6. Who are the residents that you have identified that enjoy meeting new people and would be good to invite to join during a lunch/dinner visit?

7. What new opportunities exist for us to work together?

8. In what ways do you participate in home visits?

9. Would you be interested in joining me to share your insights about dining?

10. How would you like to participate in community outreach activities?

Dessert:

1. What makes you come to work everyday?

2. Share a heart-warming story about how dining services affect our residents.

In Search Of...

Brookdale communities offer Better and Different Programs to their residents.

These programs include Brookdale Fitness B-Fit, My Life Story, Ageless Spirit, Brookdale Wishes, and Optimum Life Health Talks.

Prior to your interview with the Resident Programs Director, search BSLnet and BigTinCan to learn about these programs. Document your discoveries in the chart below.

Because each community is different, confirm, clarify, and add to these discoveries during your interview with the Resident Programs Director.

Brookdale Better and Different Programs	What is the program?	How does this program benefit our residents and their families?
Brookdale Fitness B-Fit		
My Life Story		
Ageless Spirit		
Brookdale Wishes		
Optimum Life Health Talks		

Keeping Our Residents Healthy and Happy:

Resident Programs Director Interview

Name of Resident Programs Director:______________________________

1. Tell me about the purpose of your role.

____

2. What do you love most about your role?

____

3. What is your preferred method of communication?

____

4. What programs are unique to our community? What makes them special?

____

____

5. How do you engage residents in the six dimensions of Optimum Life?

____

____

6. What programs are best to invite prospects or families to?

____

7. In what ways have you worked with a sales associate during a prospective resident's community visit?

____

8. What would you like to continue to do?

____

9. In what new ways might we collaborate?

____

(CONTINUED ON NEXT PAGE)

10. What community groups or organizations currently come into the community?

11. What groups do you feel would be good for me to connect with?

12. When would be a good time for me to meet them?

13. Tell me about the Friends for Life program. What are the benefits for Brookdale and the customer?

14. How do you partner with sales in promoting the Friends for Life Program?

15. What is the purpose of the Friends for Life event? How do we partner together on these events monthly?

16. Please share one story that highlights why you do what you do or how a program has positively impacted a resident's life.

Caring For Our Residents

Our Health and Wellness Programs

Brookdale communities offer Better and Different Programs that focus on health and wellness for their residents. These programs vary by community.

Prior to your interview with the Health and Wellness Director (HWD) and/or Wellness Nurse, do the following:

1. Access BigTinCan and read Brookdale Differentiators: Better and Different Programs Quick Reference Guide (QRG).

Brookdale Better and Different Programs	What is the program?	What types of communities offer these programs? (IL, AL, SNF)	Why is this program valuable to our residents and their families?
Personal Service System			
Service Alignment			
Personalized Living (IL Only)			
Rehabilitation & Therapy			
Collaborative Care			
Skin Integrity			
Fall Management			
CARE Process			
Home Health			
Hospice			
Other			

Because each community is different, confirm, clarify, and add to these discoveries during your interview with the HWD or Wellness Nurse.

Health and Wellness Director/Wellness Nurse Interview

Name of Health and Wellness Director or Wellness Nurse: ______________________

1. Tell me about the purpose of your role.

2. What do you love most about your role?

3. It is important for me to understand the needs of your department for a successful move-in. How can we partner together to ensure a successful move-in for the resident and your team?

4. How can I best communicate with you about a new resident moving in and what information do you need?

5. How can I best communicate with you about a potential resident's need for an assessment?

6. What are some of the challenges you have had historically with new move-ins? (CARE Program)

7. How do care associates get information that is individualized and personalized for each resident?

8. What part do you play in home visits?

9. In your role, how can you participate in community outreach to medical professionals?

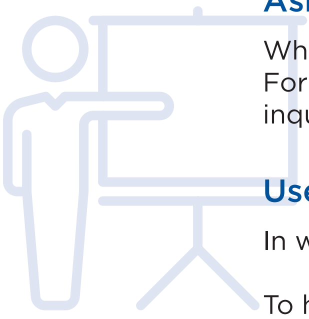
10. What is your role during a community visit with a prospective resident?

11. Please share one story that highlights why you do what you do or how a health and wellness program has positively impacted a resident's life.

Sum It Up!

Interview Summary and Reflection

After your conversation with the HWD or Wellness Nurse, summarize the key points using the framework below.



Know It:

What is the key information you learned about the role of the HWD in your community?

Ask It:

What follow-up questions do you have about what you discovered? For each question, identify a specific time to get answers to your inquires. Clarity is important.

Use It:

In what ways will you use the information in your role? Be specific.

To help you get started, we provided an example for you to use.

KNOW IT	ASK IT	USE IT
HWD prefers to meet early in the morning and needs specifics for the agenda.	*What time frame is best? Would a standing meeting be best? (confirm within 24 hours)*	*Set standing meeting with HWD.*

Scavenger Hunt

Take a Walk in Our Residents' Shoes

A helpful way to get to know your community is to walk in the shoes of its residents. By experiencing portions of a day in a resident's life, you'll discover what makes your community unique in a fun way. Plus, you'll get great stories to share.

DIRECTIONS: Experience the programs and events in the scavenger hunt. After you've completed each one, check it off the list. When the scavenger hunt is complete, take a photo of it and post it to the Brookdale Sales Facebook Page. Underneath the photo, write the name of your favorite program and why it was special.

BROOKDALE SENIOR LIVING

Name of Community ____________________

❑ Eat one of the resident's favorite meals in the dining room

❑ Participate in one popular program unique to your community

❑ Take a B-Fit class

❑ Visit the beauty/barber shop

❑ Participate in BrainFit

❑ Spend time with a resident and their pet

❑ Participate in a technology class

❑ Join an outing with residents

Reflection:

What was your favorite experience and why?

____

____

What key insights did you gain from participating in this scavenger hunt?

____

____

How can these insights help you in a conversation with a customer?

____

____

Community Connection:

Share your discoveries with your ED or DDS.

In Search of...Memory Care Communities

(Complete this activity if you are a sales associate in a Memory Care Community.)

Brookdale is the leading provider of Alzheimer's and dementia care in the United States. Through the Clare Bridge program and the latest research in dementia, Brookdale cares for thousands of people with dementia and their families in new and innovative ways.

Prior to your interview with the Clare Bridge Program Coordinator/Manager, search Brookdale.com, BLSnet and BigTinCan to learn about these programs. Document your discoveries in the chart below.

Because each community is different, confirm, clarify, and add to these discoveries during your interview with the Resident Programs Director.

Brookdale Signature Programs	What is the program?	How does this program benefit our residents and their families?
Clare Bridge Daily Path and Clustering		
Solace Late Stage Programming		
Clare Bridge Dining Program		
InTouch Technology		
Crossings Early Stage Program		
Family Partnerships		
Behavioral Problem Solving		

Meeting Our Residents Well-being and Needs

Clare Bridge Program Coordinator/Manager Interview

Name of Clare Bridge Coordinator/Manager: ______________________________

1. Tell me about the purpose of your role and leadership.

____

What do you most love about your role? How do you accomplish this each day?

____

What is your preferred method of communication?______________________________

2. What programs are unique to our community?

____

What do you do to make them person-centered? Please, give me some examples.

____

What makes them special?

____

What programs are best to invite prospects or families to?

____

3. In what ways have you worked with a sales associate during a prospective resident's community visit?

____

What would you like to continue to do?

____

In what new ways might we collaborate?

____

4. What community groups or organizations currently come into the community?

____

What groups do you feel would be good for me to connect with?

____

When would be a good time for me to meet them?______________________________

Scavenger Hunt

Take a Walk in Our Clare Bridge Residents' Shoes

A helpful way to get to know your community is to walk in the shoes of its residents. By experiencing portions of a day in a resident's life, you'll discover what makes your community unique in a fun way. Plus, you'll get great stories to share.

DIRECTIONS: Experience the programs and events in the scavenger hunt. After you've completed each one, check it off on the list. When the scavenger hunt is complete, take a photo of it and post it to the Brookdale Sales Facebook page. Underneath the photo, write the name of your favorite program and why it was special.

BROOKDALE SENIOR LIVING

Name of Community ______________________________

- ❑ Work with your Clare Bridge Program Coordinator/Manager to identify a resident to join during their program of choice. Interact with the resident, and engage in conversation on what you know or observe about that resident. Do this experience at least twice because every day is different for each resident.
- ❑ Eat with a resident at the table, and/or serve them during the meal. If appropriate, learn how to assist someone that may not be able to eat independently, and feed them.
- ❑ Assist a resident with B-Fit exercises. While participating, get to know the resident and where they are mentally and emotionally that day.
- ❑ Participate in pet therapy with a third party. Pay special attention to the effects of the pet's presence on the resident.
- ❑ Work with the Clare Bridge Program Coordinator/Manager to utilize the InTouch system.
- ❑ Participate in the reFresh program and distribute reFresh cloths.
- ❑ Join a behavioral call with the Clare Bridge Program Coordinator (CBPC) and Divisional Dementia Care Manager (DDCM).

Reflection:

What was your favorite experience and why?

____

____

What key insights did you gain from participating in this scavenger hunt?

____

How can these insights help you in a conversation with a potential resident?

____

____

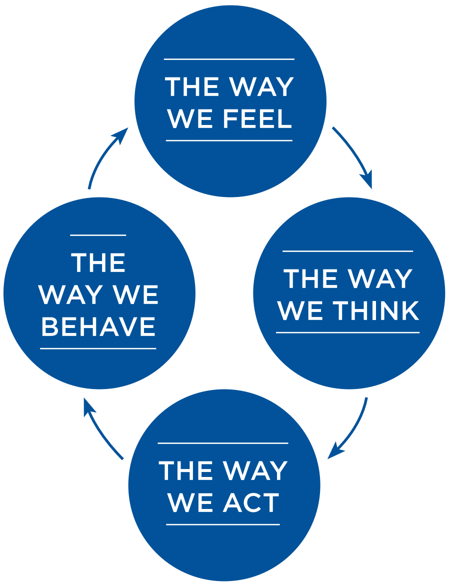
Community Connection:

Share your discoveries with your ED or DDS.

Build Your Storybook

When we hear stories, we experience what the storyteller is saying. We imagine ourselves in the story. We feel things. We take action. These factors make stories or information memorable. And being memorable, relatable, and persuasive helps sales associates succeed.

Good Stories Compel People to Change



Story Frameworks
Several story frameworks can tell the Brookdale story through the lens of different points of view. These frameworks are:

- *The Genesis Story* (the why behind senior living)
- *The Future Story* (what would happen if you/we...?)
- *The Beneficiary Story* (who you are helping and how their life is changed)
- *The Team Story* (who is behind the scenes making residents healthy and happy)
- *The Supporter Story* (someone like you—i.e. another resident—is doing this)

Story Formats
Story formats create structure for telling the story. Pixar, the block-buster-creating film maker, uses the Pixar Process to develop their history-making, financially fruitful films. The Pixar Pitch has six steps.

1. Once upon a time...
2. Every day...
3. One day...
4. Because of that...
5. Because of that...
6. Until finally...

The animated film *Finding Nemo* illustrates the Pixar Process.

1. *Once upon a time,* there was a widowed fish named Marlin who was extremely protective of his only son, Nemo.
2. *Every day,* Marlin warned Nemo of the ocean's dangers and implored him not to swim far away.
3. *One day,* in an act of defiance, Nemo ignores his father's warnings and swims into the open water.
4. *Because of that,* he is captured by a diver and ends up as a pet in the fish tank of a dentist in Sydney.
5. *Because of that,* Marlin sets off on a journey to recover Nemo, enlisting the help of other sea creatures along the way.
6. *Until finally* Marlin and Nemo find each other, reunite, and learn that love depends on trust.

Story Content
Incorporate your community's Signature Programs and Better and Different information in each of your stories. They're the backbone of Why we do, What we do!

ACTIVITY 1: Tell Your Story

DIRECTIONS: Reflect on your life and friendships, and identify a situation where you helped someone and made their life or situation better. For example, you partnered with a peer to solve a personal or professional problem or you mentored an individual to help increase their coping skills. Tell your story using the Pixar Process.

1. Once upon a time ______________________________

____

2. Every day ______________________________

____

3. One day ______________________________

____

4. Because of that ______________________________

____

5. Because of that ______________________________

____

6. Until finally ______________________________

____

ACTIVITY 2: Create Your Storybook

DIRECTIONS: Gather information from residents, associates, and other key members of your community to build five stories using each of the story frameworks. Follow the Pixar Process to craft each story.

The Genesis Story

1. Once upon a time ______________________________
2. Every day ______________________________
3. One day ______________________________
4. Because of that ______________________________
5. Because of that ______________________________
6. Until finally ______________________________

The Future Story

1. Once upon a time ______________________________
2. Every day ______________________________
3. One day ______________________________
4. Because of that ______________________________
5. Because of that ______________________________
6. Until finally ______________________________

The Beneficiary Story

1. Once upon a time ______________________________
2. Every day ______________________________
3. One day ______________________________
4. Because of that ______________________________

5. Because of that ____________________

6. Until finally ____________________

The Team Story

1. Once upon a time ____________________

2. Every day ____________________

3. One day ____________________

4. Because of that ____________________

5. Because of that ____________________

6. Until finally ____________________

The Supporter Story

1. Once upon a time ____________________

2. Every day ____________________

3. One day ____________________

4. Because of that ____________________

5. Because of that ____________________

6. Until finally ____________________

ACTIVITY 3: Tell a Story

DIRECTIONS: Tell one of your stories to a peer who is not affiliated with Brookdale. Get feedback on the story using these questions.

1. How did the story demand an emotional investment?
2. How did the story hold and pique your interest?
3. How did the story bring energy to the message?
4. How did the story cause you to take action?
5. How could I improve the story and my delivery?

ACTIVITY 4: Using Stories in the Sales Process

DIRECTIONS: Review the stories you've written and determine specific customer scenarios to apply or use the story.

For example, a customer needs a special and timely diet because they are diabetic and require insulin. You might tell a team story about the Dining Services Manager and their commitment to providing the right meals at the right time.

The Genesis Story

Customer Scenario:

The Future Story

Customer Scenario:

The Beneficiary Story

Customer Scenario:

The Team Story

Customer Scenario:

The Supporter Story

Customer Scenario:

ACTIVITY 5: Share a Story

DIRECTIONS: Practice telling your stories with your DDS. Get feedback on the content of your story and your delivery method using these questions:

1. How did the story demand an emotional investment?
2. How did the story hold and pique your interest?
3. How did the story bring energy to the message?
4. How did the story cause you to take action?
5. How could I improve the story?

Brookdale Healthcare Services

Another Way We Care for Residents

Brookdale Healthcare Services (BHS) offers options for home health care for seniors inside and outside of our communities. Partner with your community's Home Health Coordinator to create ways BHS services can be personalized for prospective residents and meet their health-care needs.

To prepare for your interview with the Home Health Coordinator, read the information to the right. What sparks your curiosity? What questions do you have? Add them to the list of questions on the next page that you'll use during your interview.

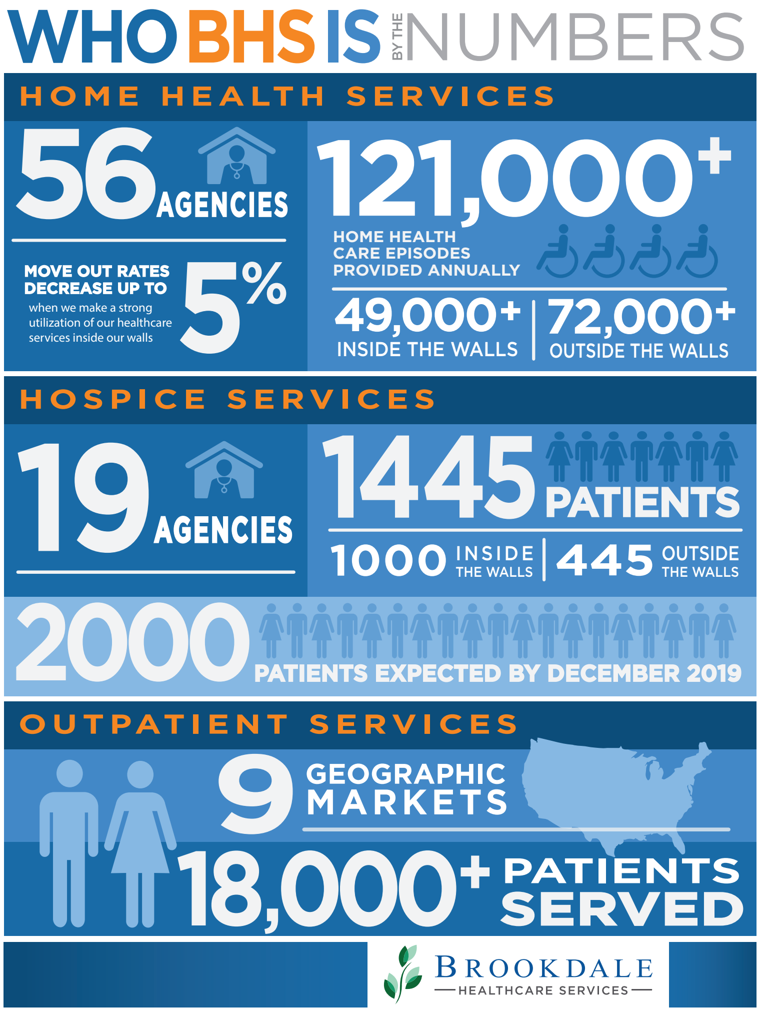
Services BHS Offers:

Skilled nursing care
- Includes services reasonably necessary for treatment
- Performed by a licensed nurse

Home health aide services
- Support services for occupational therapy
- Includes services such as bathing, using the toilet, or dressing

Therapy
- Physical therapy
- Speech-language pathology services
- Occupational therapy
- Respiratory Therapy

MSW—Clinical Medical Social Worker
- Includes social and emotional concerns related to illness
- Counseling and finding resources in the community
- Behavioral Health Nursing (Psych RN)



If your community doesn't have a partnership with your local Brookdale Home Health Agency or there is not one in your area, talk to your ED about next steps in building this relationship.

Name of Home Health Coordinator: ______________________________

1. What is your role?

____

2. What types of services does BHS offer?

____

3. How could BHS be a benefit for our current residents and new ones?

____

4. Why would a resident select BHS over another home health agency?

____

5. In what ways have you partnered with the Sales Associate in the past?

____

6. Which of those activities would you like to continue?

____

7. What events do you feel would best serve us when introducing your programs to our current residents?

____

8. How would we communicate with our teams when we have a referral for BHS or you have one for our community? What specific steps should we take?

____

____

9. Why do you do what you do? Please share a story that highlights the essence of BHS and how it affects our residents.

____

____

Live From ____________________

INSERT NAME OF YOUR COMMUNITY HERE

DIRECTIONS:

1. Answer these questions based on your personal experiences getting to know your community.
2. Create a poster for your community that summarizes your answers.
3. Take a picture of your completed poster and post it on the Brookdale Sales Facebook page.
4. Hang the poster somewhere in your office to remind you of why you said yes to Brookdale.

1. What is Brookdale's mission?

2. How did the organization get started?

3. Give specific examples of the way you saw Brookdale's core values come to life in your community?

4. What kind of first impression does your community make?

5. Describe how your role interacts with the other people leaders in your community.

6. What is of greatest importance to your community?

7. What is your community most proud of?

8. What are your community's best-known attributes?

9. What programs set your community apart from other senior living communities?

10. What are some challenges your community faces?

11. In one sentence, summarize why someone would want to be a resident in your community?

Reflection:

12. How do you feel about being part of this organization?

13. What, if any, misconceptions did you have about Brookdale and your community?
How can you clarify them?

14. What insights did you gain about Brookdale?

15. How will these insights help you as a Sales Associate?

Community Quick Reference Guide

What Makes Your Community Special

You've met your teammates. You've walked in a resident's shoes. And you've learned what makes your community special.

DIRECTIONS: To quickly access information you'll use often, complete this guide by filling in the boxes below with:

1. The names of the people in each role
2. Their preferred method of communication
3. The best way to partner with them during a visit

When you're finished, cut along the dotted line and post the guide where you'll see and use it.

What Makes Your Community Special?

Dining	Executive Director	Resident Programs

Transportation	Business Office	Home Health

Maintenance	District Director of Sales	Health and Wellness

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BROOKDALE UNIVERSITY OF SALES

EST. 2019

VISIT *Excellence*

"Creating memorable, unique, and meaningful experiences for every customer, on every visit, will always outshine the competition."

—Sales Associate, Brookdale Kenmore and Williamsville

After completing Visit Excellence, you'll be able to:

- Use the phases of the Customer Journey to drive sales strategy
- Complete an Introductory call using the VEPT
- Use a completed Visit Experience Planning Tool (VEPT) to design a personalized visit for a customer
- Use discovery questions to uncover customer needs
- Create specific Feature, Advantage, and Benefit statements to address the particular needs a customer
- Establish specific outcomes for each visit to advance customers along the Customer Journey
- Explain the different parts of the Conversation Guide and how it is used

The Customer Journey Map

The Customer Journey Map enables a Sales Associate to meet the customer where they are on a senior living journey and move them forward toward a Brookdale Senior Living solution.

The Customer Journey Map helps you:

- Identify the mindset of the customer.
- Discover what is important to the customer.
- Partner with the customer to provide a senior living solution based on their current and future needs.

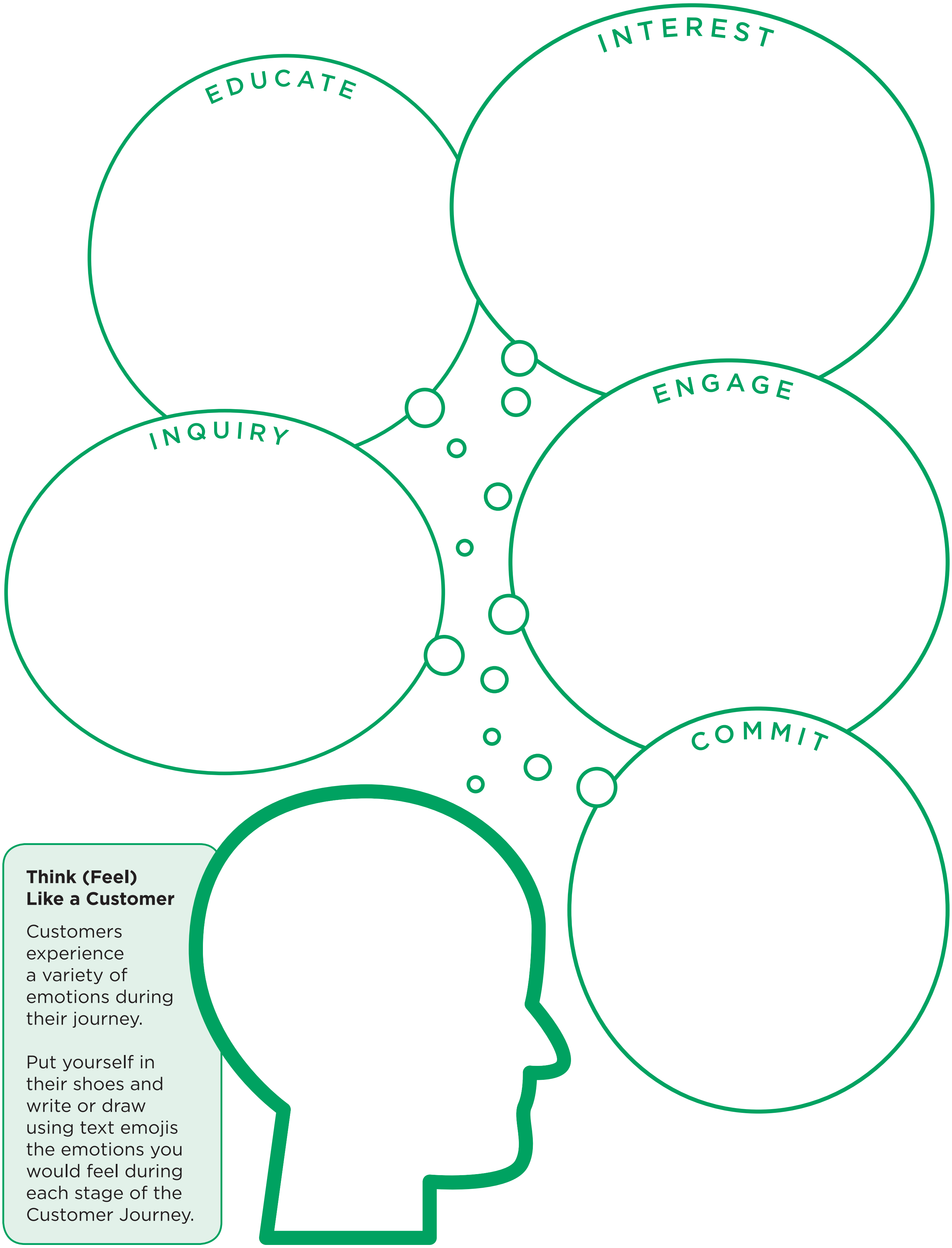
Read the information about the Customer Journey in your Sales Associate Playbook.

1. Review the Customer Journey Map in BigTinCan.
2. Print the map and post in your workspace.

ACTIVITY 1: The Customer's Mindset

DIRECTIONS: Summarize the customer's mindset in each stage of the Customer Journey.

Stage of Customer Journey	Customer Mindset
INQUIRY	
INTEREST	
EDUCATE	
ENGAGE	
COMMIT	



Think (Feel) Like a Customer

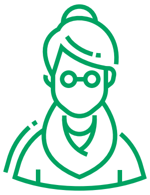
Customers experience a variety of emotions during their journey.

Put yourself in their shoes and write or draw using text emojis the emotions you would feel during each stage of the Customer Journey.

ACTIVITY 2: Where am I?

DIRECTIONS: Read the descriptions of each customer and identify where they are in the Customer Journey. Explain your answers.

1. CUSTOMER: Maureen Schiller, 81 years old



"I have lived in my house for 20 years. I'm not sure why I would need to move anywhere. Sure, I might have difficulty getting up the stairs to my bedroom, but that doesn't mean I need to move. And, yes, maybe my house is too big for me.

Since their father died, I have handled things on my own. I think my children are trying to take away more of my freedom. They've already taken away my car because of a minor fender bender. Besides, I have weekly appointments I need to attend.

I won't know anyone in one of those facilities. I'll be alone more than I am now. What about my dog? I'm not going anywhere without him.

This is very frustrating. You're asking me to change my life. For what?"

Stage in Customer Journey: ______________________________

Explanation: ______________________________

____

____

2. CUSTOMER: Meg Brown, age 48, daughter of Dave, age 76

"Since I started Googling senior living options, I've been flooded with emails and direct mail from companies offering information about their communities or facilities. I consider myself a smart person, but the amount of information is overwhelming. I don't know where to start or what would be best for my dad. He only needs a little help with his meds because his memory is failing.

One community is only 3.5 miles from my house which would make it easy for me to visit dad daily. On the other hand, that community doesn't offer the programs he would like. He's a former business executive. His calendar was always full of business lunches, golf outings, and of course, cocktail hour. There's no way he'd go without those experiences.

When I really look back on his life, Dad is pretty finicky about his lifestyle and how he is treated. He's lived a 5-star life. The pictures of the communities in these brochures look pretty institutional and old. I would have to preview the place before Dad would visit it. And for the prices I've seen, I wonder if it is better to keep him at home. I just don't know. Maybe this idea is causing more stress that we need."

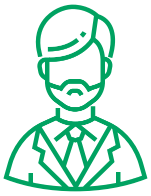
Stage in Customer Journey: ______________________________

Explanation: ______________________________

____

____

3. CUSTOMER: Zach Wolfson, age 50, son of Tanya, age 72



"Mom is still curious about the decision we made. She's asking lots of questions. I keep reassuring her that she won't lose all her financial independence. She is worried about the monthly payment to the community. To her, the community fee seems like a lot of money. Even at her age, she's still saving for the future. Mom keeps asking me to look for other options so I do. With her medical needs and frailty, I know I've found the right place. She's going to need lots of reassurance that this is the best option. I hope one day she will be as relieved as I am."

Stage in Customer Journey: ____________________

Explanation: ____________________

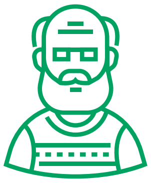
____

____

ACTIVITY 3: Create a Customer Scenario

Part 1:

DIRECTIONS: Choose a stage of the Customer Journey and write a customer scenario that illustrates that stage.



Name: ____________________ Age: __________

Role: ____________________

Scenario: ____________________

____

____

____

____

Name: ______________________________ Age: __________

Role: ______________________________

Scenario: ______________________________

____

____

____

____

Part 2:
DIRECTIONS: Take a picture of your scenario and post it on the Brookdale Sales Facebook page with the question: "Where is this customer on the Customer Journey?" and invite people to answer the question.

Discuss:
DIRECTIONS: Write three questions you have about the Customer Journey Map and discuss them with your DDS.

1. ______________________________

2. ______________________________

3. ______________________________

"Getting to know something special about everyone we come in contact with enriches our life, and provides a connection when we recognize another individual's personal likes, choices, and interest."

—Sales Associate, Brookdale Asheville Walden Ridge

Customer Journey Part 2

ACTIVITY 1: Be the Customer

DIRECTIONS: With a peer, role-play a customer and Sales Associate in one or more common situations in the Customer Journey. Give each other feedback after each role-play.

Use the following questions to guide your feedback:

1. What went well during the conversation?

2. What are some opportunities for growth?

3. What will you do differently next time?

ACTIVITY 2: What would you do next?

DIRECTIONS: Read the scenarios and determine the stage of the Customer Journey for the customers and the specific next steps for the Sales Associate.

1. Joy has called several times to explore the idea of senior living solutions for her mom, Annie. She has asked for collateral materials from several communities, including Brookdale.

Jonathan, a Sales Associate, responds to Joy's inquiry and offers to be her guide in her senior living journey. He asks several open-ended questions and identifies a few of her needs and preferences. He also carefully communicates key points about Brookdale.

Where is Joy in the Customer Journey?

What next steps would you take with Joy?

2. Thom and Irene have visited a Brookdale Community. They had a meal with another couple that resides in the community. During their visit, they met with the Resident Programs Director who shared the Signature Programs the community offers. Thom particularly liked the B-fit program and the opportunity to join other couples on educational excursions. Irene made several positive comments about the community, but mentioned several times the price seemed a bit high, especially for such a small apartment. Thom agreed with Irene and asked the Sales Associate, "What are we getting for all this money?"

Where are Thom and Irene in the Customer Journey?

___

What next steps would you take with them?

___

___

3. Joseph has visited a community twice with his mom, Olga. Olga has chosen the apartment she likes and participated in a few events at the community. She also agrees that she needs help with her medical needs. After the second visit, the Sales Associate follows up with Joseph to schedule the date for Olga's move-in. Joseph communicates that Olga would like to wait a few months and see if they can manage Olga's needs a bit longer at home.

Where are Joseph and Olga in the Customer Journey?

___

What next steps would you take with them?

___

___

ACTIVITY 3: In the Journey

DIRECTIONS: Choose one of your customers in a specific stage of the Customer Journey. Role-play with your DDS a conversation with that customer to move them forward in the journey. Before the role play begins, describe in detail the stage of the journey that the customer is in and seek confirmation from your DDS that the assessment is correct. In your role-play, be sure to include specific next steps in the conversation. As you get feedback from your DDS, use these questions to guide your conversation:

1. What went well during the conversation?

___

2. What are some opportunities for growth?

___

3. What will you do differently next time?

___

Common Influencers

Throughout the sales process, you will meet a variety of influencers whose buy-in is critical in reaching the COMMIT stage of the Customer Journey.

Read the information about Common Influencers in your Sales Associate Playbook.

Access BigTinCan and do the following:

1. View the Our Customer Video.

ACTIVITY 1: Common Influencer Matrix

Part 1:

DIRECTIONS: Complete the chart below by doing the following:

Rows 1-4: Write the name of the four types of Common Influencers.

Column 1: Record each influencer's objectives for senior living.

Column 2: Write each influencer's potential challenges.

Column 3: Write actions to meet each influencer's objectives.

Column 4: Record actions to meet each influencer's challenges.

Column 5: Write actions you'll take to create the desired "Brookdale Impression" or positive frame of reference for each influencer.

	Objectives	Challenges	Actions to address their objectives	Actions to address their challenges	Actions to create the desired impression of Brookdale
Influencer: 					
Influencer: 					
Influencer: 					
Influencer: 					

Part 2:
DIRECTIONS: Use the information in the Customer Influencer Matrix to answer the questions below.

1. Compare the objectives and challenges of each influencer.
What differences do you notice in their points of view?

2. How can you utilize these differences to tailor your conversation with them?

3. Choose one influencer that you least encounter in your role.
What are some ways you can reach out to them?

ACTIVITY 1: Think Like an Influencer

DIRECTIONS: Assume the role of one of the types of influencers you see most often in your community and role-play a conversation with your DDS. Use the information in the matrix to inform your conversation.

What are the benefits of thinking like an influencer?

The Introductory Call Guide (ICG)

The Introductory Call Guide is used when talking to customers on the phone. It helps you gather the essential information about a customer while allowing the conversation to flow as naturally as possible.

Access BigTinCan and do the following:

1. Read the Introductory Call Guide portion of the Sales Associate Playbook.
2. Read the Introductory Call Guide Quick Reference Guide (QRG).
3. Review the Role Play Evaluation Tool: Inquiry Call.

ACTIVITY 1: The Purpose of the Introductory Call Guide

DIRECTIONS: Write the purpose of each part of the Introductory Call Guide in the chart below. Then answer the questions that follow the chart.

Part of Guide	Purpose
Opening Discussion	
Personal Connections	
Care and Wellness	
Readiness	
Transition	
Financial	
Closing Discussion	

1. In what ways does using the Introductory Call Guide set a Sales Associate up for success?

____

____

2. How does the Introductory Call Guide discussion benefit the potential resident or family member?

____

____

ACTIVITY 2: The Introductory Call

DIRECTIONS: Go to BigTinCan (BTC) and listen to a sample Introductory Call. As you listen, follow the flow of the conversation using the Introductory Call Guide (ICG) and answer the questions below.

1. What questions did the Sales Associate ask during the call?

____

____

____

Introductory Call Guide

BROOKDALE SENIOR LIVING

Use this guide to gather the appropriate information to schedule a visit or prepare for a visit that has already been scheduled.

OPENING DISCUSSION

1. Introduce yourself.
Example: *"Hi, (Customer Name), this is (Associate Name) from Brookdale Senior Living. I'm following up on your (call/email/other) and was wondering if you had a few minutes to talk?"*

2. Set the tone of the conversation.
Example: *"Great! At Brookdale, we're centered on care and wellness for older adults, and I'd love to spend a few minutes answering any questions you may have. I want to be a resource to help you (Loved One) live your (their) best possible life."*

Note: If the customer already has a scheduled visit, acknowledge the date and time of the visit.

3. Trigger the initial discovery conversation.
Example: *"Tell me a little bit about yourself? What made you reach out? How can I help (You/Loved One)?"*

Note: Review the Customer Information Form to transition the conversation (avoid questions they've already answered).

If they only want pricing: ***"I understand that pricing is important to you. Our pricing is personalized based on your loved one's needs. I would love to understand more about your situation so we can provide that information."***

THESE ARE SAMPLE QUESTIONS AND DO NOT NECESSARILY NEED TO ALL BE ASKED OVER THE PHONE; INSTEAD, AIM TO COVER THE 5 KEY AREAS OF DISCOVERY

PERSONAL CONNECTIONS	• *What are (You/Loved One) like? Tell me a bit more about (You/Him/Her).* • *What are their current hobbies/interests?*
CARE AND WELLNESS	• *What is your greatest concern about (Loved One's) wellbeing?* • *What are the care or wellness goals you have for (You/Loved One)?*
READINESS	• *What do you already know about senior living?* • *What have you discussed about senior living with (Loved One)?* • *What is your timeline for making this decision?*
TRANSITION	• *Have you spoken to any other family members about this?* • *What can we do to help make this transition easier for (You/Loved One)?*
FINANCIAL	• *Did you have a particular budget in mind?* • *What financial needs/concerns/questions can we address together? Are you or your spouse a military veteran?*

At any point in the conversation, especially at the trigger point, make sure you show empathy.

"I know it's not easy."
"You're not alone."
"I'm here for you."

Their responses to these questions should tell you where they are in the customer journey.

CLOSING DISCUSSION

1. Summarize/confirm the information you learned.
Example: *"Thank you so much for your time today. What we discussed is…(key points)."*

Confirm recap is accurate.

Note: Highlight any personal connections that you uncovered during your call.

2. Schedule specific day/time for visit and set expectations.
Example: *"I'd love to continue our conversation in person and have you see how our community feels like home. Is there a day and time that works best for you to come in for a visit?"*

Note: If the customer already has a visit scheduled, confirm the date and time and let them know that you're looking forward to meeting with them.

3. Politely ask how they heard about Brookdale and thank them for calling!
Example: *"Thank you so much for your time today, I'm already looking forward to your visit. One last question: How did you hear about us*

Remember, I'm here for you, so if you need anything else before your visit, don't hesitate to reach out. Have a good day!"

Promote the visit as an educational experience to help them learn more about senior living.

Practice so this language sounds authentic and sincerely expresses our desire to help.

2. Summarize the main points of the call and the initial concern or needs of the customer or family member.

____

____

____

____

____

ACTIVITY 3: The Introductory Call

DIRECTIONS: Listen to the call from Activity 1: The Introductory Call again and evaluate it using the Introductory Role Play Evaluation Tool: Inquiry Call.

BROOKDALE
SENIOR LIVING

Role Play Evaluation Tool: Inquiry Call

Associate Name	

Listen for:

Opening Discussion/First Impression
- ❑ Caller's Name
- ❑ Name of loved one (resident's name)
- ❑ Ask permission to ask questions and state purpose

Uncovering Needs
- ❑ Determine how the caller heard about Brookdale
- ❑ Identify current living situation/needs
- ❑ Ask about care and wellness needs/concerns
- ❑ Identify time frame of making a decision
- ❑ Identify who is involved in making the decision
- ❑ Ask a financial readiness question/identify budget
- ❑ Understand current or past hobbies, interests, likes/dislikes, etc.
- ❑ Provide relevant information to the customer's needs/passions/interests

Closing Discussion
- ❑ Summarize needs and confirm summary is correct
- ❑ Attempt to schedule an appointment for a visit or other appropriate next step based on caller's needs
- ❑ Provide recap of next steps

Overall Impression
- ❑ Friendly and professional
- ❑ Demonstrated active listening
- ❑ Express sympathy and empathy appropriately

% of time sales associate spoke vs listened

❑ 30% ❑ 50% ❑ 70%

Check all contact information obtained:
- ❑ Prospect's Phone
- ❑ Prospect's Email
- ❑ Influencer's Phone
- ❑ Influencer's Email

Continue

Stop

Start

Bringing **New Life** to Senior Living

Uncovering Customer's Needs

The Discovery Model

Conducting proper discovery during the Customer Journey is critical. During discovery, you gather information for the purpose of uncovering the customer's needs and providing relevant solutions. Discovery helps you get to know the customer and sets the tone for your ongoing relationship.

Mastering the discovery process can be broken down into four major skill sets:

- Asking the right questions.
- Actively listening to the answers.
- Offering solutions based on those answers.
- Getting customers unstuck to advance their senior living journey.

Brookdale uses the funnel model for discovery. The funnel contains specific questions to help you drill down on a customer's needs.

Access BigTinCan and do the following:

1. Read the Discovery QRG.
2. Listen to a recorded discovery conversation between a Sales Associate and a customer.

ACTIVITY 1: Different Types of Questions

DIRECTIONS: Define the different types of discovery questions used in Brookdale's funnel, and develop two questions or statements for each type.

1. General Idea

Definition: ______________________________

Question 1: ______________________________

Question 2: ______________________________

2. Explore the Cause

Definition: ______________________________

Question 1: ______________________________

Question 2: ______________________________

3. Pause
Instead of developing two questions, write two empathic statements.

Definition: ______________________________

Statement 1: ______________________________

Statement 2: ______________________________

4. Restatement

Definition: ______________________________

Statement 1: ______________________________

Statement 2: ______________________________

5. Delve Deeper

Definition: ______________________________

Question 1: ______________________________

Question 2: ______________________________

6. Reveal and Resolve

Instead of developing two questions, write a confirmation statement and a resolution statement.

Definition: ______________________________

Statement 1: ______________________________

Statement 2: ______________________________

7. What do you notice about the types of questions in the funnel?

____

8. When uncovering a customer's needs, what are the advantages of using discovery questions instead of Yes/No questions?

____

____

9. How does active listening impact the results of your discovery?

____

____

10. Why are clarification statements critical to the discovery process?

____

____

ACTIVITY 2: The Funnel

Part 1
DIRECTIONS: Draw a funnel on the next page. Be sure your drawing fills the entire space.

Notice how the funnel is wide at the top and narrow on the bottom. The shape of the funnel mirrors the process of probing questions. At the beginning of a conversation, discovery questions are broad. They become more narrow and specific as you get to know your customer.

Most discovery questions are typically open-ended and designed to elicit more than a Yes or No answer. These questions often begin with "what," "why," or "how," and help you identify the customer's true needs.

Part 2:
DIRECTIONS: Order these discovery questions by writing the broadest question at the top of your funnel and the most specific at the bottom.

Tell me about your mom, Sarah.

What would happen if she could have those types of experiences now?

Which situations are most difficult for your mom?

When you think of the many benefits of senior living, what other opportunities would you like your mom to have?

How would knowing your mom carefully followed medication and dietary routines affect you and your quality of life?

On a daily basis, what would you say is your greatest struggle regarding Sarah's care?

Think back to a time when your mom was more active and independent. What do you remember?

Use the answers to this activity on page 55 to check your work.

ACTIVITY 3: Go Discover

DIRECTIONS: Recruit three associates in your community and use the discovery model to uncover the specific information about each of them. Spend no more than 10 minutes with each associate.

TIP: Ask open-ended questions during your conversation, and use closed-ended questions for statements of clarification only.

Associate 1: Ideal/dream vacation
Ask an associate to think of their favorite or dream vacation. Your job is to uncover what is most important, why, timeframe, and so on.

Associate 2: Biggest regret
Ask an associate to think of their biggest regret. Your job is to uncover what it is, how it impacted them, and if they had the chance to do if over, what would they do.

Associate 3: Android or I-phone user
Find an associate that has a different type of phone than you. Use discovery questions and clarification statements to uncover why, how long they've been that type of phone user, and what they would do to improve their phone, if at all.

Reflection:
1. How did asking open-ended questions impact your ability to uncover the information you were looking for?

____

2. If you used only Yes/No questions, how would the conversations change?

____

ACTIVITY 4: The Nelson Twins

DIRECTIONS: Read the conversation between a Sales Associate (SA) and a customer. Underline each discovery question. Circle each non-discovery question, and change it to a discovery question when appropriate.

Customer: Thomas Nelson, twin brother of Thaddeus Nelson, age 70.

SA: "Hi, Thomas. I'm Samantha. Please sit down. I understand you'd like to take a tour of our community. Is that correct?"

Customer: "Yes, I was driving by and thought I'd stop in to take a look and get some information for my brother, Thad."

SA: "OK! Tell me about Thad."

Customer: "Thad is my twin brother. We've lived together for the past five years, ever since our wives died. We have no children. It's just the two of us."

SA: "Is there anything special Thad and you like to do?"

Customer: "He was a successful contractor for 40 years. The guy can build anything. He likes to tinker in our garage. He builds, and I paint."

SA: "In addition to tinkering, what are some of Thad's other interests and hobbies?"

Customer: "Thad loves to cook and ballroom dance. Thursday nights we go to Fred Astaire to dance. Women love to Tango with him. Thad makes incredible Italian food using our mom's recipes. My favorite is Chicken Cacciatore. We do most things together. We have all of our lives. Even our wives were best friends."

SA: "It sounds like you have a special relationship with Thad. What caused you to begin looking for a senior living solution for Thad?"

Customer: "For the past year, Thad's health and eyesight have been failing. He's legally blind. He needs more help than I can provide. I still work and my work requires travel. So I have to leave him at home alone. He won't go anywhere without me because he doesn't trust people. When you can't really see, it's hard to tell what's happening around you. Once I left him at home alone and he tried to cook dinner. Because he couldn't see the flame on the stove, he burned his arm. I felt so guilty. And that's just once incident."

SA: "You mentioned that Thad's health is failing. Can you describe what's happening?"

Customer: "He has diabetes. He used to give himself insulin, but now he wears a pump. It's hard for him to manage. They don't make a braille version. I have to help monitor it."

SA: "How have these changes in Thad's health and eyesight impacted you?"

Customer: "I'm tied to Thad. Either he comes with me to work or I stay home. Don't get me wrong, I love him and I'd do anything for him. I'm getting older, too. I don't feel qualified to handle the medical situations we face. I'm afraid I'll make a mistake."

SA: "And Thad? How has his failing eyesight and diabetes impacted him?"

Customer: "I wish he were here to tell you. From my perspective, Thad feels guilty for relying so heavily on me. He's constantly apologizing. I think he's depressed now, especially since he doesn't get out much anymore. When we talk, he mentions the things we used to do instead of the things we could do. I suggest projects to do, dances to attend, and restaurants to try. He responds no, no, no. It's tiring, but he's my brother."

SA: "How would your life be different if you didn't have to worry about Thad's health and safety anymore?"

Customer: "I don't think that's an option. I can't abandon Thad. He trusts me and only me."

SA: "I understand this is difficult for you. You are not alone in this."

Customer: "I wouldn't have to be the only one Thad has. I could do things without feeling guilty. I could have a little freedom, maybe."

SA: "What I am hearing you say is that you are concerned about your ability to care for Thad's diabetes and blindness and the impact it has on your life. Is that correct?"

Customer: "Yes, that's partially correct. It's more than my ability to care for Thad. It's his quality of life. He needs to be around other people rather than home alone most of the day."

SA:: "Do you see Thad's quality of life changing in the future?"

Customer: "The doctors have told us that his diabetes will worsen and he will lose all of his eyesight."

SA: "Is that all?"

ACTIVITY 5: Wrap up the Conversation

DIRECTIONS: Reread the conversation in Activity 4: The Nelson Twins, and finish the conversation using the correct steps in the funnel. Add more lines of dialogue, if necessary.

SA: "Is that all?"

Customer: ______________________________

SA: ______________________________

Customer: ______________________________

SA: ______________________________

Customer: ______________________________

ACTIVITY 6: Create Discovery Questions Using Question Stems

Creating discovery questions on the fly takes practice. Use question stems to jumpstart your discovery process.

Question stems provide a structure for formulating questions that are specifically tailored to your customer. Each stem is similar to a fill in the blank. Choose the stem that most applies to your customer and their particular situation.

Stem Examples
What's the best thing that could happen to ___________?
What would have to change in order for ___________?
What's another way you might ___________?
What sort of an impact do you think ___________?
How did you decide/determine/conclude ___________?
What is the best thing that could happen ___________?
What are you most concerned will happen ___________?
How do you feel when ___________? What might this tell you about ___________?
What is the one thing you won't compromise ___________?
What criteria do you use ___________?
What evidence exists ___________?
If time/money was not an issue ___________?

DIRECTIONS: Read the following scenario and use question stems to write five discovery questions a SA might have used to uncover Alice and Bill's needs.

A Sales Associate discovers Alice, age 81, loves to keep busy and misses her relationships with her friends because most of them have passed away. She loves to read and has been very active in her church. Her son, Bill, worries about his mom on a daily basis and feels that her current home health care is not worth the current cost. Recently, she had bypass surgery and is recuperating slowly due to her diabetes. Medication management is a necessity due to insulin and seven other meds. She needs help with self-care. Bill is eager to find a solution for his mom without a huge financial impact on the two of them.

1.____

2. ____

3. ____

4. ____

5. ____

ACTIVITY 7: Practice Discovery

DIRECTIONS: Role-play a discovery conversation with a peer based on the customer scenario below. Be sure to use all the types of questions in the funnel.

Scenario:
Lawrence and Pietra are visiting your community for the first time. During the introductory call with them, you discovered that they have been married for 25 years, have two kids, and are ready to downsize to a home with one floor.

Pietra is recovering from a broken hip that hasn't healed as expected. As a result, she can no longer play tennis three times a week with her friends at the club. She's put on 20 pounds in the last year.

Lawrence's health is fine except for his blood pressure. He wears a pressure cuff and takes medication to control his blood pressure. He, also, controls his high cholesterol with medication.

ACTIVITY 8: Discovering a Customer's Needs

DIRECTIONS: Role-play with your DDS a discovery conversation with one of your current customers in the Educate Phase of the Customer Journey. Prior to the role-play, give your DDS an overview of the customer.

ACTIVITY 9: How did I do?

DIRECTIONS: Use the following questions to seek feedback about the role-play you conducted in Activity 8: Discovering a Customer's Needs.

1. What went well in the conversation?
2. What opportunities do I have for improvement?
3. What tips do you have to make my discovery conversations more effective?

ANSWER KEY FOR FILL THE FUNNEL ACTIVITY:

1. Tell me about your mom, Sarah.
2. On a daily basis, what would you say is your greatest struggle regarding Sarah's care?
3. Which situations are most difficult for you mom?
4. How would knowing your mom followed medication and dietary routines affect you and your quality of life?
5. Think back to a time when your mom was more active and independent. What do you remember?
6. What would happen if she could have those types of experiences now?
7. When you think of the many benefits of senior living for your mom, what other opportunities would you like her to have?

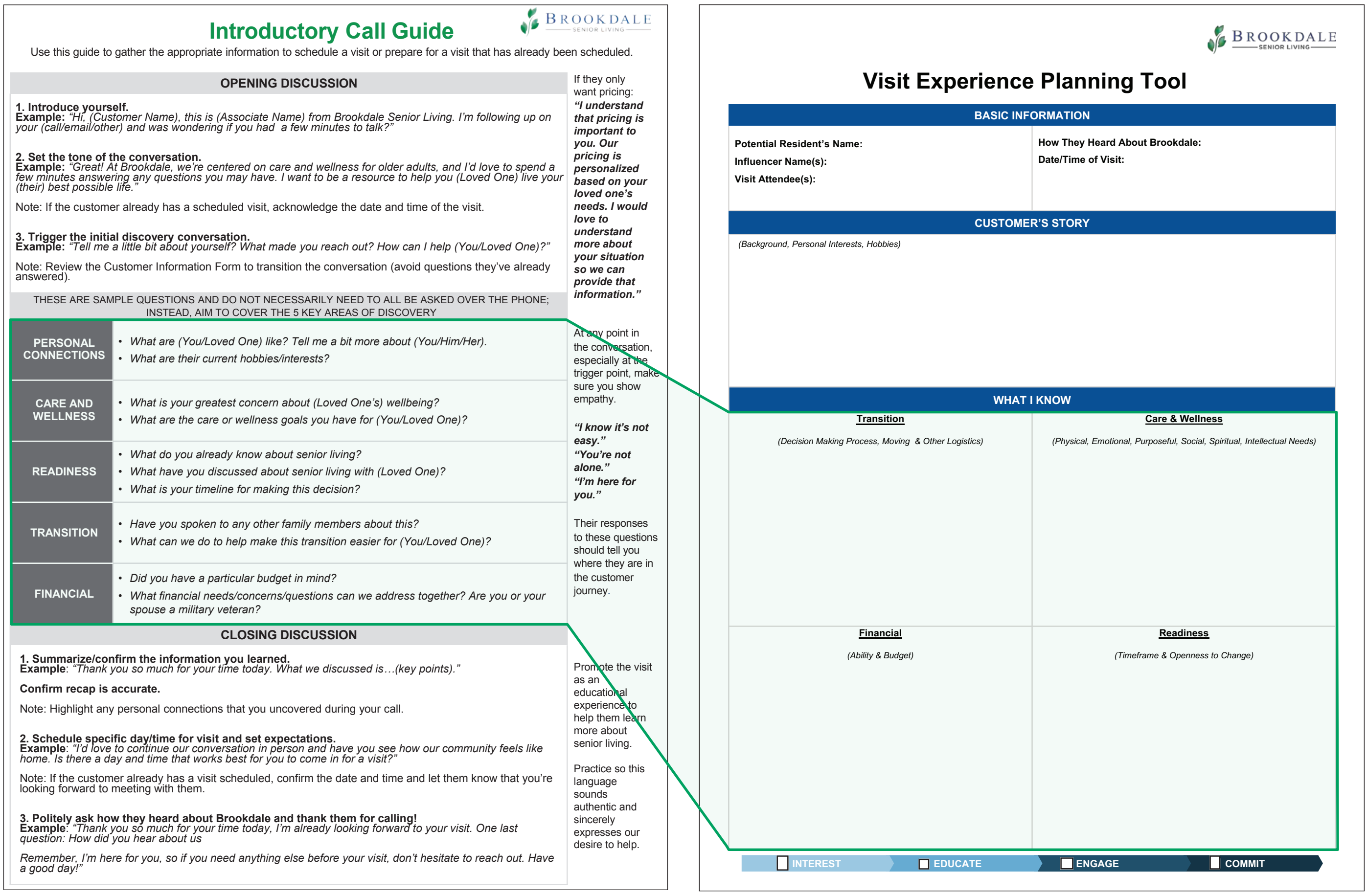
The Visit Experience Planning Tool (VEPT) Page 1

Documenting the Introductory Call

The Introductory Call Guide provides an outline for you to follow during the Introductory Call. The Visit Experience Planning Tool (VEPT) is used to take notes during that call.

Access BigTinCan and do the following:

1. Read the VEPT portion of the Sales Associate Playbook.
2. Read the VEPT Quick Reference Guide (QRG).
3. The gray shaded area on the Introductory Call Guide identifies the five key areas to cover. Jot down the important information on each of those topics in the corresponding box on the first page of the Visit Experience Planning Tool.



BROOKDALE SENIOR LIVING

Introductory Call Guide

Use this guide to gather the appropriate information to schedule a visit or prepare for a visit that has already been scheduled.

OPENING DISCUSSION

1. Introduce yourself.
Example: *"Hi, (Customer Name), this is (Associate Name) from Brookdale Senior Living. I'm following up on your (call/email/other) and was wondering if you had a few minutes to talk?"*

2. Set the tone of the conversation.
Example: *"Great! At Brookdale, we're centered on care and wellness for older adults, and I'd love to spend a few minutes answering any questions you may have. I want to be a resource to help you (Loved One) live your (their) best possible life."*

Note: If the customer already has a scheduled visit, acknowledge the date and time of the visit.

3. Trigger the initial discovery conversation.
Example: *"Tell me a little bit about yourself? What made you reach out? How can I help (You/Loved One)?"*

Note: Review the Customer Information Form to transition the conversation (avoid questions they've already answered).

If they only want pricing: ***"I understand that pricing is important to you. Our pricing is personalized based on your loved one's needs. I would love to understand more about your situation so we can provide that information."***

THESE ARE SAMPLE QUESTIONS AND DO NOT NECESSARILY NEED TO ALL BE ASKED OVER THE PHONE; INSTEAD, AIM TO COVER THE 5 KEY AREAS OF DISCOVERY

PERSONAL CONNECTIONS	• *What are (You/Loved One) like? Tell me a bit more about (You/Him/Her).* • *What are their current hobbies/interests?*
CARE AND WELLNESS	• *What is your greatest concern about (Loved One's) wellbeing?* • *What are the care or wellness goals you have for (You/Loved One)?*
READINESS	• *What do you already know about senior living?* • *What have you discussed about senior living with (Loved One)?* • *What is your timeline for making this decision?*
TRANSITION	• *Have you spoken to any other family members about this?* • *What can we do to help make this transition easier for (You/Loved One)?*
FINANCIAL	• *Did you have a particular budget in mind?* • *What financial needs/concerns/questions can we address together? Are you or your spouse a military veteran?*

At any point in the conversation, especially at the trigger point, make sure you show empathy.

"I know it's not easy." "You're not alone." "I'm here for you."

Their responses to these questions should tell you where they are in the customer journey.

CLOSING DISCUSSION

1. Summarize/confirm the information you learned.
Example: *"Thank you so much for your time today. What we discussed is…(key points)."*

Confirm recap is accurate.

Note: Highlight any personal connections that you uncovered during your call.

2. Schedule specific day/time for visit and set expectations.
Example: *"I'd love to continue our conversation in person and have you see how our community feels like home. Is there a day and time that works best for you to come in for a visit?"*

Note: If the customer already has a visit scheduled, confirm the date and time and let them know that you're looking forward to meeting with them.

3. Politely ask how they heard about Brookdale and thank them for calling!
Example: *"Thank you so much for your time today, I'm already looking forward to your visit. One last question: How did you hear about us*

Remember, I'm here for you, so if you need anything else before your visit, don't hesitate to reach out. Have a good day!"

Promote the visit as an educational experience to help them learn more about senior living.

Practice so this language sounds authentic and sincerely expresses our desire to help.

BROOKDALE SENIOR LIVING

Visit Experience Planning Tool

BASIC INFORMATION

Potential Resident's Name: **Influencer Name(s):** **Visit Attendee(s):**	**How They Heard About Brookdale:** **Date/Time of Visit:**

CUSTOMER'S STORY

(Background, Personal Interests, Hobbies)

WHAT I KNOW

Transition *(Decision Making Process, Moving & Other Logistics)*	**Care & Wellness** *(Physical, Emotional, Purposeful, Social, Spiritual, Intellectual Needs)*
Financial *(Ability & Budget)*	**Readiness** *(Timeframe & Openness to Change)*

INTEREST | EDUCATE | ENGAGE | COMMIT

ACTIVITY 1: VEPT Review

DIRECTIONS: Review the completed first page of the VEPT below. Use the information in it to answer these questions:

1. What questions did the Sales Associate ask to obtain this information?

____

____

2. What other information about the customer would you want to know?

____

3. Why is this information helpful in planning a visit?

____

BROOKDALE

Visit Experience Planning Tool

BASIC INFORMATION

Potential Resident's Name: Mary Ellen & John
How They Heard About Brookdale: Ginger
Influencer(s) Name: Ethan
Date/Time of Visit: 1/13
Visit Attendee(s): Ethan, Kristie wife

CUSTOMER'S STORY

(Background, Personal Interests, Hobbies)

- From Detroit Mich. origin.
- Moved to Richland during Hanford Boom to be a Mech. Engineer
- Mary Ellen → Retired teacher
- Part of the ye old Car club.
- Know Ginger, Jim V. & Myrtle Nesbitt.
- Love Travel - China, Bali, the Caribbean, Australia
- Sail boats, history
- John - Loves speaking about his time sailing around the world
- Mary Ellen - Full-time Caregiver for her sister Nell for 30 years.
- John sailed around the world for two years on the 'Brigateen'
- Son #2 - Brian; Lives in Virginia.
- John - Heart issues 3 stays in rehab this year.
- Not a veteran

WHAT I KNOW

Transition

(Decision Making Process, Moving & Other Logistics)

- Son Ethan is helping w/ desision & move.
- Not ready to sell home as they arent sure if Senior Living is the right choice.
- Son is too busy w/ Vet. office to do everything.
- Changing Places a good help
- BeKins can do move.

Care & Wellness

(Physical, Emotional, Purposeful, Social, Spiritual, Intellectual Needs)

- Need access to emergency response
- John's health issues have put Mary under a lot of stress.
- @ Richland LifeCare.
- Need AL for Nell and want to be close.
- John - Needs reg. exercise to keep out of rehab.
- Mary Ellen - needs a break, but scared to let go of her duties.
- They want to reconnect w/ their Social group.

Financial

(Ability & Budget)

- Home - Zillow estimate $1 Million value
- Monthly Income - $12,000
- Stocks & Bonds
- LTC policy for future AL need
- No set Budget

Readiness

(Timeframe & Openness to Change)

As soon as they find a community that is a good fit.
Afraid of making [redacted] a decision
Love their home on the river.
Worried Nell needs 24 hour supervision
- Open to trying a SLC.

☐ ENGAGEMENT ☐ COMMITMENT

ACTIVITY 2: Use the VEPT during an Introductory Call

DIRECTIONS: Go to BTC and listen to another sample introductory call. Use the first page of the VEPT to document the discoveries the Sales Associate made during the call.

BROOKDALE SENIOR LIVING

Visit Experience Planning Tool

BASIC INFORMATION	
Potential Resident's Name: **Influencer Name(s):** **Visit Attendee(s):**	**How They Heard About Brookdale:** **Date/Time of Visit:**

CUSTOMER'S STORY
(Background, Personal Interests, Hobbies)

WHAT I KNOW	
Transition *(Decision Making Process, Moving & Other Logistics)*	**Care & Wellness** *(Physical, Emotional, Purposeful, Social, Spiritual, Intellectual Needs)*
Financial *(Ability & Budget)*	**Readiness** *(Timeframe & Openness to Change)*

☐ INTEREST ☐ EDUCATE ☐ ENGAGE ☐ COMMIT

ACTIVITY 3: Role-Play an Introductory Call

Part 1:

DIRECTIONS: Role-play an Introductory Call with a peer or family member. Record the call using your smartphone. Follow the Introductory Call Guide and take notes on the first page of the Visit Experience Planning Tool.

BROOKDALE
SENIOR LIVING

Visit Experience Planning Tool

BASIC INFORMATION	
Potential Resident's Name: **Influencer Name(s):** **Visit Attendee(s):**	**How They Heard About Brookdale:** **Date/Time of Visit:**

CUSTOMER'S STORY
(Background, Personal Interests, Hobbies)

WHAT I KNOW	
Transition *(Decision Making Process, Moving & Other Logistics)*	**Care & Wellness** *(Physical, Emotional, Purposeful, Social, Spiritual, Intellectual Needs)*
Financial *(Ability & Budget)*	**Readiness** *(Timeframe & Openness to Change)*

☐ INTEREST ☐ EDUCATE ☐ ENGAGE ☐ COMMIT

Part 2:

DIRECTIONS: Listen to the recording you made with your friend in Part 1 and conduct a self-evaluation using the Role Play Evaluation Tool: Inquiry Call. Pay special attention to your tone of voice and the time you spoke vs. the time the other person spoke.

BROOKDALE
SENIOR LIVING

Role Play Evaluation Tool: Inquiry Call

Associate Name	

Listen for:

Opening Discussion/First Impression

- ❑ Caller's Name
- ❑ Name of loved one (resident's name)
- ❑ Ask permission to ask questions and state purpose

Uncovering Needs

- ❑ Determine how the caller heard about Brookdale
- ❑ Identify current living situation/needs
- ❑ Ask about care and wellness needs/concerns
- ❑ Identify time frame of making a decision
- ❑ Identify who is involved in making the decision
- ❑ Ask a financial readiness question/identify budget
- ❑ Understand current or past hobbies, interests, likes/dislikes, etc.
- ❑ Provide relevant information to the customer's needs/passions/interests

Closing Discussion

- ❑ Summarize needs and confirm summary is correct
- ❑ Attempt to schedule an appointment for a visit or other appropriate next step based on caller's needs
- ❑ Provide recap of next steps

Overall Impression

- ❑ Friendly and professional
- ❑ Demonstrated active listening
- ❑ Express sympathy and empathy appropriately

% of time sales associate spoke vs listened

❑ 30% ❑ 50% ❑ 70%

Check all contact information obtained:

- ❑ Prospect's Phone
- ❑ Prospect's Email
- ❑ Influencer's Phone
- ❑ Influencer's Email

Continue

Stop

Start

Bringing **New Life** to Senior Living

Part 3:

DIRECTIONS: Write a to-do list of specific actions you'll take to improve your ability to conduct an Introductory Call and document the call on the VEPT.

Activity 4: Putting it All Together

DIRECTIONS: Role-play an Introductory Call with your DDS using the ICG and the first page of the VEPT.

BROOKDALE SENIOR LIVING

Visit Experience Planning Tool

BASIC INFORMATION	
Potential Resident's Name: **Influencer Name(s):** **Visit Attendee(s):**	**How They Heard About Brookdale:** **Date/Time of Visit:**

CUSTOMER'S STORY
(Background, Personal Interests, Hobbies)

WHAT I KNOW	
Transition *(Decision Making Process, Moving & Other Logistics)*	**Care & Wellness** *(Physical, Emotional, Purposeful, Social, Spiritual, Intellectual Needs)*
Financial *(Ability & Budget)*	**Readiness** *(Timeframe & Openness to Change)*

☐ INTEREST ☐ EDUCATE ☐ ENGAGE ☐ COMMIT

Activity 5: Get Feedback

DIRECTIONS: Solicit feedback on your strengths and opportunities for improvement using the Role Play Evaluation Tool: Inquiry Call.

BROOKDALE
SENIOR LIVING

Role Play Evaluation Tool: Inquiry Call

Associate Name	

Listen for:

Opening Discussion/First Impression
- ❑ Caller's Name
- ❑ Name of loved one (resident's name)
- ❑ Ask permission to ask questions and state purpose

Uncovering Needs
- ❑ Determine how the caller heard about Brookdale
- ❑ Identify current living situation/needs
- ❑ Ask about care and wellness needs/concerns
- ❑ Identify time frame of making a decision
- ❑ Identify who is involved in making the decision
- ❑ Ask a financial readiness question/identify budget
- ❑ Understand current or past hobbies, interests, likes/dislikes, etc.
- ❑ Provide relevant information to the customer's needs/passions/interests

Closing Discussion
- ❑ Summarize needs and confirm summary is correct
- ❑ Attempt to schedule an appointment for a visit or other appropriate next step based on caller's needs
- ❑ Provide recap of next steps

Overall Impression
- ❑ Friendly and professional
- ❑ Demonstrated active listening
- ❑ Express sympathy and empathy appropriately

% of time sales associate spoke vs listened

❑ 30% ❑ 50% ❑ 70%

Check all contact information obtained:
- ❑ Prospect's Phone
- ❑ Prospect's Email
- ❑ Influencer's Phone
- ❑ Influencer's Email

Continue

Stop

Start

Bringing **New Life** to Senior Living

Activity 6: Take Action

DIRECTIONS: Record specific action steps to take to improve your skills. Begin your steps with verbs. What will you DO differently?

1.____

2. ____

3. ____

EXTRA CREDIT: If time allows, role-play another Introductory Call implementing the improvements you noted. Follow the same evaluation process you used in the previous role play.

The More You Know

Make a list of other questions to ask during the Introductory Call to discover more information about the customer.

1.____

2. ____

3. ____

4. ____

5. ____

Before your next Introductory Call, review this list and choose questions to use, if appropriate.

A Personal Connection

A Personal Connection is a way to create a *meaningful, unique,* and *memorable* experience for all associates, residents, potential residents, families, professional referral sources, competitors, vendors, volunteers, regulators, neighbors, and applicants.

Access BigTinCan and do the following:
Read the Personal Connection Quick Reference Guide (QRG).

ACTIVITY 1: Connect to Customers in "MUMorable" Ways

DIRECTIONS: Use the information in the Personal Connection QRG to complete the following questions:

1. Define the acronym M.U.M.

M ____

U ____

M ____

2. What is the difference between a nice gesture and a Personal Connection?

____

____

3. Why do we create Personal Connections for our customers?

____

____

4. What information can you use to help you create a Personal Connection for a customer?

____

____

5. In what part of the Customer Journey would you share the Personal Connection? Why?

____

____

ACTIVITY 2: Create Personal Connection

DIRECTIONS: Read each customer's story and develop a Personal Connection that passes the MUM test.

Mickey and Maureen's Story
You discover that Mickey played the trombone since he was 14. Throughout his life, he would visit jazz clubs to watch other trombone players perform. Occasionally, Mickey would bring his trombone and sit in with the band. That's how he met Maureen, his wife. She was sitting front row at one of the shows at Club Beale Street. Three weeks later, they were married. For the last 30 years, they have returned to that jazz club to relive the moment they first met. To make the night special, Maureen would arrange for Mickey to sit in with the band, and she would sit in the front row.

Create a "MUMorable" Personal Connection for Mickey and Maureen

---

Shannon's Story
During two visits, you notice that Shannon wears a matching knitted hat and scarf. As she talks, she grasps the scarf. You compliment Shannon on the uniqueness of the items and she mentions that she made them. Shannon explains that she loves to knit and has made hats, scarves, and blankets for hundreds of people. Shannon shares that she has taught teenagers to knit and has worked with them to knit caps for babies. The teenagers are part of a service group at the local high school. Shannon asks if you would like a blanket and inquires about your favorite colors.

Create a "MUMorable" Personal Connection for Shannon

Thomas' Story
You discover that Thomas loved growing heirloom tomatoes in his garden. When they were ripe, he would walk through his neighborhood and give bags of tomatoes to his neighbors. Sometimes the neighbors would invite Thomas to a meal that included his homegrown heirlooms. Some of the kids in the neighborhood gave Thomas a nickname: Tomato Tom. In recent years, due to a lack of independent mobility, Thomas hasn't been able to tend to his garden and deliver his tomatoes to his neighbors.

Create a "MUMorable" Personal Connection for Thomas

ACTIVITY 3: Share a Personal Connection

DIRECTIONS: Photograph one of the Personal Connections you developed in Activity 2 and email the photo to your DDS. Set up a phone call to review the Personal Connection with them. After receiving feedback on the PC, post the photo to the Brookdale Sales Facebook page.

Features, Advantages, and Benefits

Our role is to understand our customer and their needs, so that we may present them with the most helpful and applicable features available. By understanding our customer's needs, we can sell the tangible and emotional benefits of what our communities have to offer.

Access BigTinCan and do the following:

1. Read the FAB portion of the Sales Associate Playbook.
2. Read the Features, Advantages, and Benefits Quick Reference Guide (QRG).

ACTIVITY 1: FAB Facts

DIRECTIONS: Use the information outlined in the Features, Advantages, and Benefits Quick Reference Guide to answer the following questions:

1. What questions do Features, Advantages, and Benefits answer for the customer?

Feature: ______________________________

Advantage: ______________________________

Benefit: ______________________________

2. Where do you find the information to build FAB statements for each customer?

____

3. How does using FAB personalize a customer experience?

____

____

4. When presenting a FAB statement to a customer, how do you determine if they agree with the benefit you have presented?

____

____

5. What would you do if a customer disagreed with the benefits you shared?

____

____

ACTIVITY 2: How is your Community FABulous?

DIRECTIONS: List three Signature Programs offered in your community. Under each program, write a Feature, Advantage, and Benefit.

1. Signature Program: ____________________

Feature: ____________________

Advantage: ____________________

Benefit: ____________________

2. Signature Program: ____________________

Feature: ____________________

Advantage: ____________________

Benefit: ____________________

3. Signature Program: ____________________

Feature: ____________________

Advantage: ____________________

Benefit: ____________________

What other FAB statements can you develop about your community?

1. ____________________

2. ____________________

3. ____________________

ACTIVITY 3: How is your sister Brookdale community FABulous?

DIRECTIONS: Reach out to the Sales Associate in a sister community. Find out the Signature Programs they offer that you do not. Create a FAB statement for each of those programs.

1. Signature Program: ______________________________

Feature: ______________________________

Advantage: ______________________________

Benefit: ______________________________

2. Signature Program: ______________________________

Feature: ______________________________

Advantage: ______________________________

Benefit: ______________________________

3. Signature Program: ______________________________

Feature: ______________________________

Advantage: ______________________________

Benefit: ______________________________

How does knowing the Signature Programs of a sister community benefit you and a potential customer?

____

____

DIRECTIONS: Solicit feedback from your DDS on the FAB statements you created in Activity 2: How is your Community FABulous? and Activity 3: How is your sister Brookdale community FABulous?. Rewrite the FAB statements based on their recommendations.

Good, Better, Best

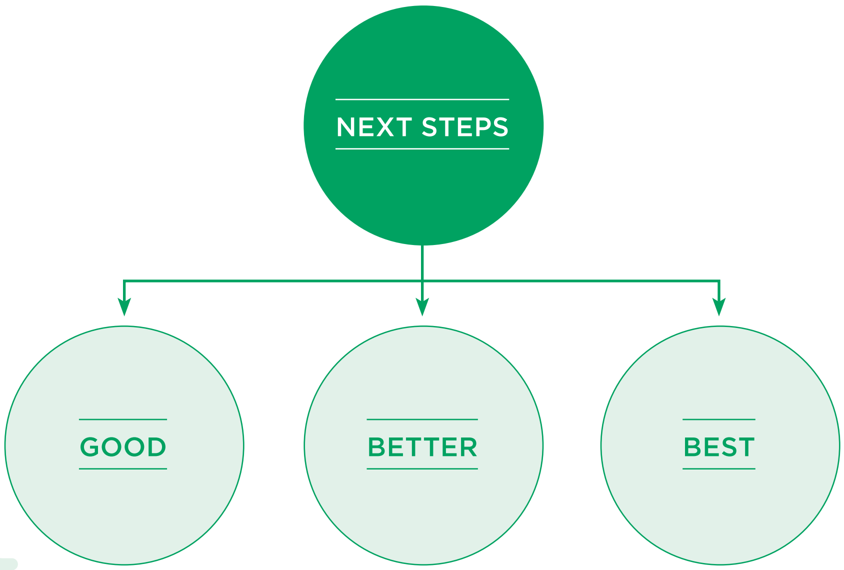
Using Good, Better, and Best helps you plan the potential outcome of a conversation with a customer. It allows you to effectively identify the next steps for the customer's journey.

Access BigTinCan and do the following:

1. Read the Next Steps Quick Reference Guide (QRG).
2. Review the Good, Better, Best entries on three completed VEPTs.

ACTIVITY 1: Why Good, Better, and Best?

DIRECTIONS: Record the differences among Good, Better, and Best outcomes/next steps in the graphic below.



What are the benefits of using Good, Better, and Best when planning each customer visit?

ACTIVITY 2: Identifying *Your* Good, Better, and Best

Directions: Read each situation and identify the Good, Better, and Best outcomes for each one.

Situation 1: Your plane is two hours late.

Good: ______________________________

Better: ______________________________

Best: ______________________________

Situation 2: You want to buy a new car.

Good: ______________________________

Better: ______________________________

Best: ______________________________

Situation 3: You have to reduce monthly spending by $1,000.

Good: ______________________________

Better: ______________________________

Best: ______________________________

"Find your outlet—maybe it's listening to music, reading, walking, or sitting in a quiet place. I am always amazed that 15 minutes of peace can renew my attitude, my patience, and my energy to move forward."

—Sales Associate, Brookdale Alexandria

ACTIVITY 3: Create Good, Better, and Best Outcomes for Two Visits

DIRECTIONS: Read the information on the 2nd page of the VEPT and develop Good, Better, and Best outcomes for that customer relationship. Write your answers on the VEPT.

BROOKDALE SENIOR LIVING

Visit Experience Planning Tool (Continued)

PERSONAL CONNECTION

(Create a connection that is Meaningful, Unique and Memorable)

Magazine or book about Charlotte to send to Patricia.

PEOPLE TO INVOLVE

Staff Members and Resident(s) to Meet:

Pamela, Kimberly, Arnie

Messages to Share:

Arnie to share how moving into a community has benefited ~~him~~ he & his wife.

WHAT I NEED TO KNOW

Transition

- What might keep Patricia from leaving FL?
- What does a typical day look like?

Care & Wellness

- Does she still drive?
- Use any assistive devices?

Financial

What is monthly budget?
Does she need to sell home before making a move?

Readiness

Timeframe for a move?

TIP: Match your outcomes to the customer's stage in the journey. Move-in isn't always the best outcome. For example, if a customer is in the interest stage, a move-in, though possible, would not be the best outcome for that stage.

COMMUNITY

Community Features to Highlight: *(personalize to customer based on previous conversations)*

Feature – Community Living	Feature – Transportation	Feature – Full continuing care community
Advantage – Having 24 hour onsite support	Advantage – Provided trips to MD, shopping + special outings	Advantage – Age in Place
Benefit – Can be as social as you want but	Benefit – No longer having to worry about maintenance of car	Benefit – Would not have to make another big move.

NEXT STEP

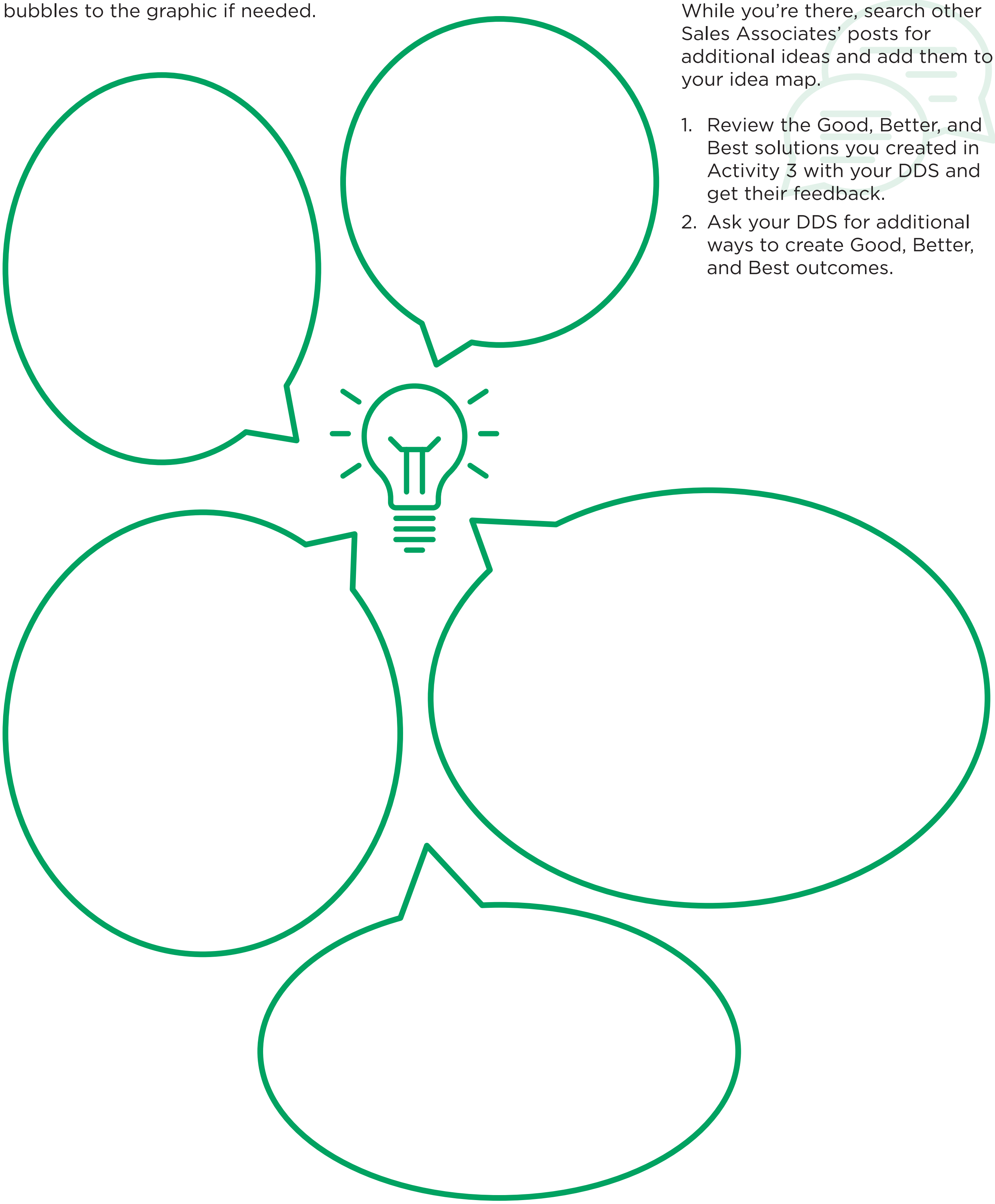
Good: ______________________________

Better: ______________________________

Best: ______________________________

ACTIVITY 4: Idea Map for Possible Next Steps

DIRECTIONS: Brainstorm a variety of next steps to use with customers. Make sure your next steps are measureable and time activated. Write your ideas in the bubbles. Add more bubbles to the graphic if needed.



ACTIVITY 5: Snap a Photo

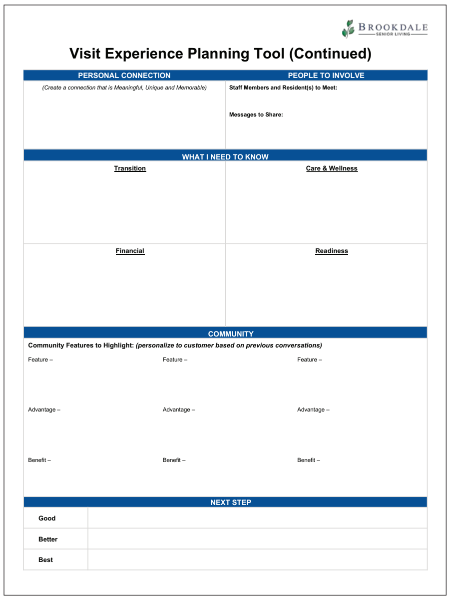
Take a picture of the completed assignment and post it to the Brookdale Sales Facebook page. While you're there, search other Sales Associates' posts for additional ideas and add them to your idea map.

1. Review the Good, Better, and Best solutions you created in Activity 3 with your DDS and get their feedback.
2. Ask your DDS for additional ways to create Good, Better, and Best outcomes.

The VEPT Page 2

Planning a Customer Visit

The second page of the Visit Experience Planning Tool is a guide to prepare for the customer's visit.



Visit Experience Planning Tool (Continued)

PERSONAL CONNECTION	PEOPLE TO INVOLVE
(Create a connection that is Meaningful, Unique and Memorable)	**Staff Members and Resident(s) to Meet:** **Messages to Share:**

WHAT I NEED TO KNOW

Transition	Care & Wellness
Financial	**Readiness**

COMMUNITY

Community Features to Highlight: ***(personalize to customer based on previous conversations)***

Feature –	Feature –	Feature –
Advantage –	Advantage –	Advantage –
Benefit –	Benefit –	Benefit –

NEXT STEP

Good	
Better	
Best	

Access BigTinCan and do the following:

1. Review the VEPT portion of the Sales Associate Playbook.
2. Review the VEPT Quick Reference Guide (QRG).

ACTIVITY 1: Being Customer Focused

DIRECTIONS: You're preparing to introduce a customer to a friend or associate. Describe the customer in detail using the completed first page of the VEPT on the next page.

(example)

BROOKDALE SENIOR LIVING

Visit Experience Planning Tool

BASIC INFORMATION

Potential Resident's Name: Richard and Sandy

How They Heard About Brookdale: Lives in Neighborhood, Dr office nearby

Influencer Name(s): Richard

Date/Time of Visit: 2/20/19 10 am

Visit Attendee(s): Repeat visit Richard and Sandy

CUSTOMER'S STORY

(Background, Personal Interests, Hobbies)

1st visit March 2018 – currently looking for day stay options – would like for Sandy to be around different people besides them. Richard 81, Sandy 74, married 32 years, lived in Ak most of life., retired to FL didn't like it was too hot to much traffic – have been in Sevierville 5 years, camped there & fell in love w/ mountains, lives in Paine Lake

Richard was retail commercial banking 43 years

WHAT I KNOW

Transition

(Decision Making Process, Moving & Other Logistics)

Also visited Dominion

Sandy has 2 sons in OR → they are secondary POA

Have a lot of antiques and clocks – would be hard to downsize

still pretty independent

Oregon is expensive

Care & Wellness

(Physical, Emotional, Purposeful, Social, Spiritual, Intellectual Needs)

Sandy has dementia diagnosis

PCP was Dr. Wheatly (retired)

Sandy still good conversation skills → sometimes non sensical

Still able to do all ADL's

walks unassisted.

it is her short term memory

Fav. Restaurant Golden Coral

Financial

(Ability & Budget)

Insurance is Medicare & Retired Teamsters

own town home

was in Alaska National Guard (Vietnam) but cant qualify for benefits

Readiness

(Timeframe & Openness to Change)

Richard wants to have plan for Sandy in case something happens to him

Preferred deluxe suite on previous visit

like to eat late breakfast & midday meal

the clocks are 50 & 100 yrs old

INTEREST | EDUCATE | ENGAGE | COMMIT

Access BTC and do the following:

1. Review the Next Steps portion of the Sales Associate Playbook.
2. Review the Next Steps — Good, Better, Best Quick Reference Guide (QRG).

ACTIVITY 2: A Plan for a Customer Visit

Part 1:

DIRECTIONS: Review the second page of the VEPT for Richard and Sandy on the previous page and answer the following questions:

1. Describe how the Personal Connection item is meaningful, unique, and memorable. What other items would you choose?

2. Who are the people the Sales Associate includes in the customer's visit? In what ways does the customer benefit from meeting these people?

I sent this poem to Richard after 1st visit, he shared with me on this visit that he kept the poem and on bad days he gets it out and reads it! It made me feel good!

BROOKDALE SENIOR LIVING

Visit Experience Planning Tool (Continued)

PERSONAL CONNECTION	PEOPLE TO INVOLVE
(Create a connection that is Meaningful, Unique and Memorable) Richard and Sandy married for 32 years, very dependent on each other, Richard talked about how some days are difficult w/ Sandy having dementia - Sent a poem that talks about being in moment with a person who even has Alz.	Staff Members and Resident(s) to Meet: Jay HWD, Amy ED, Nichole BOC, Jeff Maintenance, Sieta Neuteboom Messages to Share: Let Richard and Sandy talk to Ed & Sieta why they like Brookdale & how furniture can fit

WHAT I NEED TO KNOW

Transition	Care & Wellness
timeline? Still considering Oregon?	Sandy's care needs change in condition since March?

Financial	Readiness
Did you speak to Albert Stout at VA? Consider selling home? LTC?	Sons in Oregon? Why wait?

COMMUNITY

Community Features to Highlight: *(personalize to customer based on previous conversations)*

Feature - Have lots of antique furniture (Downsize)	Feature - Transition to MC for Sandy	Feature - Cost of living TN vs Oregon
Advantage - Emphasize less house more home	Advantage - Easy transition since same faces Do not know they have moved	Advantage - money will last longer
Benefit - Let them see Sieta's apartment & see how much furniture can fit in one bedroom or deluxe	Benefit - MC option as dementia changes	Benefit - less expensive more services and amenities offered

NEXT STEP

Good	They will see that the size of apartment will work.
Better	To take measurements of apartment layout for furniture & write on floor plan
Best	To receive deposit check and be put on wait list if AL appropriate

* outcome → Deposit received this week!

3. What additional information does the Sales Associate need to obtain during the visit? What strategies will they use to get it?

4. How has the Sales Associate personalized the visit for the customer? What specific needs will be addressed?

5. Evaluate the options for Good, Better, and Best. Indicate "yes" or "no" in each box, and underneath your answer, explain your decision. For additional information on Good, Better, Best, go to BigTinCan and read the QRG.

	Specific Is the action clear?	**Achievable** Is the action within the customer's influence?	**Relevant** Is the action relevant to where the customer is in the Customer Journey?	**Time-bound** Is there a timeframe to complete the action?
GOOD				
BETTER				
BEST				

Part 2:
DIRECTIONS: Compare the plan for Richard and Sandy's visit to your introduction of them in Activity 1: Being Customer Focused, and answer the questions below.

1. In what ways does the planned visit "fit" the customer you described?

2. What would you remove from the visit and why?

3. What would you remove from the visit? Why?

4. What are the unintended consequences of applying a one-size-fits-all approach to visit planning?

The Conversation Guide

The Conversation Guide is used during the CONNECTING stage of a customer visit, home visit, or any face-to-face interaction with a customer.

Read the information about the Conversation Guide in your Sales Associate Playbook.

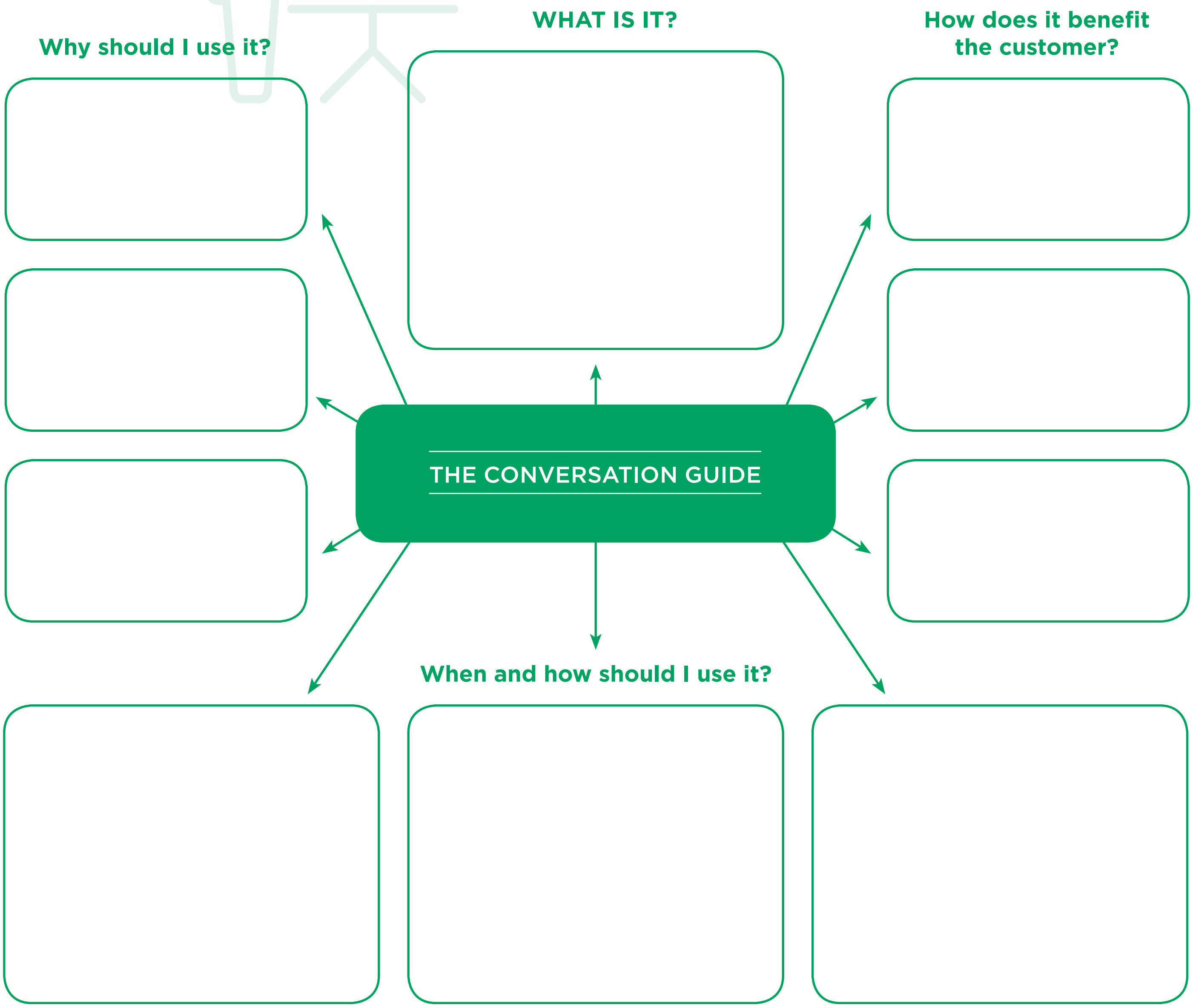
Read the information about the Conversation Guide in your Sales Associate Playbook.

Access BigTinCan and do the following:

1. Review the Conversation Guide QRG.
2. Call a Sales Associate for a sister community and ask them to share tips about the use the Conversation Guide during a visit.

ACTIVITY 1: The Big Picture

DIRECTIONS: Using the concepts covered in the Conversation Guide QRG, complete the diagram below.



ACTIVITY 2: Snap a Photo

DIRECTIONS: Take a picture of the complete diagram and post it to the Brookdale Sales Facebook page. Send the photo to your DDS, too.

ACTIVITY 3: Conversation Guide Scavenger Hunt

DIRECTIONS: Review the completed front and back pages of the Conversation Guide located in BigTinCan. Use them to find the answers to the questions in this Scavenger Hunt.

Before the Visit:
Write three specific ways a completed 2nd page of the VEPT helps you use the Conversation Guide?

1. ______________________________

2. ______________________________

3. ______________________________

Our Time Today:
What is the purpose of this section?

____

How do you share it with the customer?

____

Your Story:
Where do you gather information for the customer's story?

____

What does it help you do during their visit?

____

The Wheel:
What does this information help you do?

____

____

When and how do you obtain it?

____

____

Give an example of a probing question you would use to discover information to populate one of the quadrants of the wheel?

____

Story to Share:
How do you determine the story to tell?

____

How does telling a specific story help you and the customer?

____

FAB Statements:
How do you use FAB Statements in the Conversation Guide?

____

What do they help you do during the visit?

____

The Value of Brookdale:
What specific information do you share?

____

Why do you include a specific date when explaining the value of Brookdale?

____

What happens if the date is not included?

____

Next Steps:
List two ways this information helps you move the customer forward in their journey.

1. ____

2. ____

Why should next steps be time bound, tangible, and actionable?

____

List an example of a next step that is time bound, tangible and actionable?

____

After the Visit:
What do you do with the completed Conversation Guide? Why?

____

____

Building and Training Your A-Team

As a Sales Associate, part of your role is to be outside of the community building relationships and connections with potential referral sources and networking with organizations. Members of your A-Team partner with you to meet customers' needs in your absence (including your days off).

A successful A-Team has approximately seven members, and identifying the right people for your A-Team is critical. Work with your ED and HWD to identify associates who are passionate, good communicators, and committed to your community, and invite them to join your team.

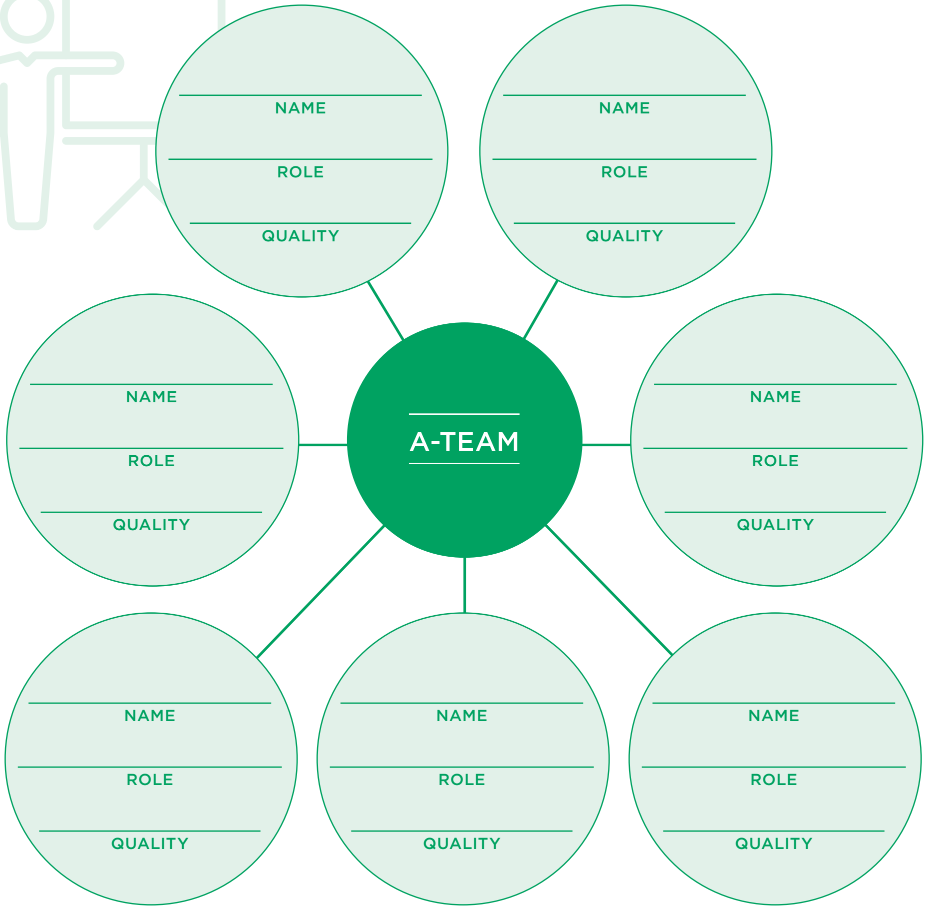
Access BTC and do the following:

1. Read the A-Team Quick Reference Guide (QRG).
2. Download and review the A-Team PowerPoint Training.
3. Review the 30-Second Commercial QRG.

These resources give you information to equip your A-Team members with the skills to take an inquiry call, conduct a community visit experience, and have a financial conversation.

ACTIVITY 1: Create Your Team

DIRECTIONS: Use the graphic below to map the members of your A-Team. Beneath each name, record the person's role and one quality or characteristic that makes them ideal for your team.



ACTIVITY 2: Listen to a 30-second commercial

DIRECTIONS: Access BigTinCan and listen to the 30-second commercial. As you listen to the call, identify the six steps and record key words the A-Team member used in each step.

Who: ____________________

What: ____________________

Most Important: ____________________

How: ____________________

Why: ____________________

Close: ____________________

ACTIVITY 3: Train Your A-Team

DIRECTIONS: Once you have chosen your A-Team, set them up for success with proper training using the A-Team QRG and PowerPoint training deck.

Part of your training should include helping each team member develop their 30-second commercial. Use the 30-Second Commercial QRG and audio clip to help A-Team members develop their commercials.

ACTIVITY 4: Meet with Your A-Team

After you have trained your A-Team, meet with them weekly to discuss customer and community updates and practice their 30-second commercial.

BROOKDALE UNIVERSITY OF SALES
EST. 2019

ADVANCING THE Journey

"The faster you realize your responsibility to educate families in need and to take them by the hand to guide them through the process the faster you become successful in helping a family in need."

—Sales Associate,
Brookdale Medi Park West

After completing Advancing the Journey, you'll be able to:

- Use Brookdale's Sales Management System (SMS) to build and execute your sales strategy
- Create and maintain the Hot Bot Board in your community
- Conduct the sales portion of a Stand Up meeting
- Overcome customer objections successfully
- Have a financial conversation with a customer
- Use the Personal Service Estimate (PRE) to calculate an estimated care cost for a customer

The Sales Management System

The Sales Management System (SMS) is Brookdale's Customer Relationship Management (CRM) system designed to ensure consistent management of leads (including prospects and influencers) and referral sources (including organizations and contacts), as well as follow up activities.

Go to BigTinCan

1. Access the SMS training and workbook.
2. SMS Knowledge Base in Service Now.
3. Lead Nurture Standards.
4. Sales Systems Quick Reference Guide (QRG).

Complete the SMS training

DIRECTIONS: Keep a list of questions that arise as you use SMS. Discuss the questions about using SMS with you ED and DDS weekly.

Text Message
Task Manager
MEDICAL OUTREACH
REFERRALS
Educate
Relationship
Social Media
Personal Connection
Contact
DASHBOARD
Prospect Needs
PROSPECT
Interest
Reports
Inquiry
Lead Search
DATABASE
Email
Respite
SALES
Notes
Assessment
Visit
Customer Journey
Sales Call
Follow Up
Community of Interest
Lead Source
Engage
Calendar
Move-In
Wait List
Paid Partners
Network Selling
FRIENDS FOR LIFE
Phone Call
Special Event
Commit
Decision Timeframe
NON-MEDICAL OUTREACH
Future List
Home Visit
Mass Processing
INFLUENCER
Direct Mail

The Hot Board

Every community uses a consistent Hot Board. The Hot Board keeps the A-Team and leadership team aligned around sales priorities and provides structure for the daily Stand Up meeting.

Read the Hot Board portion of the Sales Associate Playbook.

ACTIVITY 1: Get to Know the Hot Board

DIRECTIONS: Answer the following questions about the Hot Board. They'll form the foundation for using it.

1. Summarize the purpose of the Hot Board in one sentence.

2. Where do you locate the information to populate each section of the Hot Board?

3. How often is the Hot Board updated?

4. How do team members benefit from the information on the Hot Board?

5. What are the benefits of listing sales goals on the Hot Board?

6. What is the benefit of having the name of the MOD listed on the Hot Board?

7. Why are Move Outs and At Risk residents on the Hot Board? How does this information inform your actions?

8. Describe the interdependence of the Hot Board and the Stand Up meeting.

9. How is your success as a Sales Associate connected to the thoroughness of the Hot Board?

ACTIVITY 2: Create a Hot Board

DIRECTIONS: Using the Hot Board below as a reference, create the Hot Board for your community using the Community Sales Dashboard. Be sure to include leads in each stage for your Hot Board.

MONTH OCC.	THIS WEEK			
88%	**VISITS**	**OUTREACH VISITS**	**MOVE OUTS**	**AT RISK**
GOAL Phone Calls: 45/60 Outreach: 20/27 Visits: 13/20 Move-ins: 2/4 FFL: 2/3	• 2/5 Carter • 2/6 Regan • 2/6 Schultz • 2/7 Arias • •	• Dr. Johns • St. Thomas • Father Frank Aston • SNF	• Phil Lesh, #405 • • • • •	• Smiths, #612 • Bob Weir, #211 • • • •

LEADS	INQUIRY	INTEREST	EDUCATE	ENGAGE	COMMIT
	Firth Philippi Spayad	Puryear:	Schultz:	Arias: Cost Issue Seems stuck	Carter
NURTURE ACTIONS	Send "You made the right call" flyer to each	Home visit safety check with HWD	Schedule assessment after visit	Follow-up email—reminder about next steps and build urgency if necessary	Collect community fee and off Paragon resource to relocation assistance

EVENTS	MOD
FFL Brunch Senior Entrepreneur Meeting Clergy Gathering St. Josephs	

ACTIVITY 3: Photograph your Hot Board

DIRECTIONS: When you have completed the Hot Board, take a picture of it and send it to your DDS and schedule time with them to review it. Discuss key steps for at least one lead in each Customer Journey stage of the pipeline.

1. Inquiry: ______________________________

2. Interest: ______________________________

3. Educate: ______________________________

4. Engage: ______________________________

5. Commit: ______________________________

ACTIVITY 4: I've Got Questions

DIRECTIONS: Review your Hot Board with your DDS. Prior to the meeting, develop five questions you want to ask them about the Hot Board. Record the DDS's responses to each question.

1. Question:____

   Answer: ____

2. Question:____

   Answer: ____

3. Question:____

   Answer: ____

4. Question:____

   Answer: ____

5. Question:____

   Answer: ____

ACTIVITY 5: What's Hot?

DIRECTIONS: Revise your Hot Board based on your DDS's input, and present the Hot Board during Stand Up with your community's leadership team.

Get feedback on your presentation from your ED.

The Stand Up Meeting

In a Stand Up Meeting, a Sales Associate delivers sales-related updates and action steps to the broader team in the community. Stand Up meetings occur daily and they help you manage your time wisely.

Read the Stand Up Meeting portion of the Sales Associate Playbook.

ACTIVITY 1: Stand Up and Stand Out

DIRECTIONS: Use the information about Stand Up meetings in the Sales Associate Playbook to answer these questions.

1. Leads
Where do you locate the information to cover on leads?

Why is it important to give details on people in different parts of the Customer Journey, not just the specifics on customers ready to move-in?

What key information do you share about each lead?

2. Visits
As you review planned visits, what would you do if a team member cannot participate in the visit?

When providing status updates, what questions do you think team members may have?

Where do you find the information to update the team on the status of customer visits?

3. Inventory
Where do you locate the information about community inventory?

____

Why is it important to update team members on sales promotions?

____

4. Marketing
What would be a team assignment for a marketing event?

____

5. Outreach
What information is included in this part of the Stand Up meeting?

____

How do you prepare to share it?

____

6. Review the list of information you'll present in a typical Stand Up meeting. How much time will you allocate to prepare for your presentation?

____

7. Summarize the importance of the Stand Up meeting in two sentences.

____

____

"I believe in never stopping. "Just One More"!! When you think you have helped everyone… help one more. One more move in!!"

—Sales Associate, Brookdale Medi Park West

ACTIVITY 2: Evaluate a Stand Up Meeting

DIRECTIONS: Observe a Stand Up meeting and note on the checklist if ED or other team member accomplished each part of the Sales portion of the meeting. Add additional comments for each part in the third column.

Parts of Sales Portion of Stand Up Meeting	Yes/No	Additional Comments
Covered topics in 20 minutes or less	Y ❑ N ❑	
Updated/accurate Hot Board	Y ❑ N ❑	
Used the Hot Board to facilitate discussion	Y ❑ N ❑	
Established a clear next step for each lead	Y ❑ N ❑	
Developed a shared understanding of the BD activities for this week	Y ❑ N ❑	
Articulated clear next action to advance leads forward to the next step in the Customer Journey	Y ❑ N ❑	
Presented a clear next step for all the other sales topics	Y ❑ N ❑	

ACTIVITY 3: Role-Play a Stand Up Meeting

DIRECTIONS: Schedule time with your DDS and practice the sales portion of a Stand Up meeting with them. (Send your DDS a photo of your Hot Board before the role-play.)

LEADS	
VISITS	
INVENTORY	
MARKETING	
OUTREACH	

ACTIVITY 4: Help Me Shine!

DIRECTIONS: Use the 3, 2, 1 model to evaluate the Stand Up meeting role-play. Ask the DDS to share:

3: Three things you did well

2: Two opportunities for improvement

1: One tried and true tip

Advancing the Journey and Closing

Closing is simply advancing the relationship to the logical, timely, and agreed upon next step with your customer. When you focus on what next steps will benefit your customer the most, you will naturally work toward a move in.

Access BigTinCan and do the following;

1. Read the Advancing the Relationship–Closing QRG.
2. Listen/Watch two closing conversations.

ACTIVITY 1: Closing Concerns

DIRECTIONS: Reflect on your experiences closing conversations and advancing the journey with customers and answer the questions below.

1. Mark your current capacity on the Closing Continuum.
One star indicates "I need help" and 5 stars indicates "I'm a pro!"

I need help ★ ★ ★ ★ ★ *I'm a pro*

Explain your rating.

____

____

2. Why do you think Sales Associates are reluctant to close?

____

____

3. What are disadvantages of not closing?

____

____

4. Why do we close at every stage of the Customer Journey?

____

____

5. Which closing situations are most problematic for you and why?

1. ______________________________

____

Explanation: ______________________________

____

2. ______________________________

____

Explanation: ______________________________

____

3. ______________________________

____

Explanation: ______________________________

____

6. Analyze the impact of proper discovery on advancing the sale.

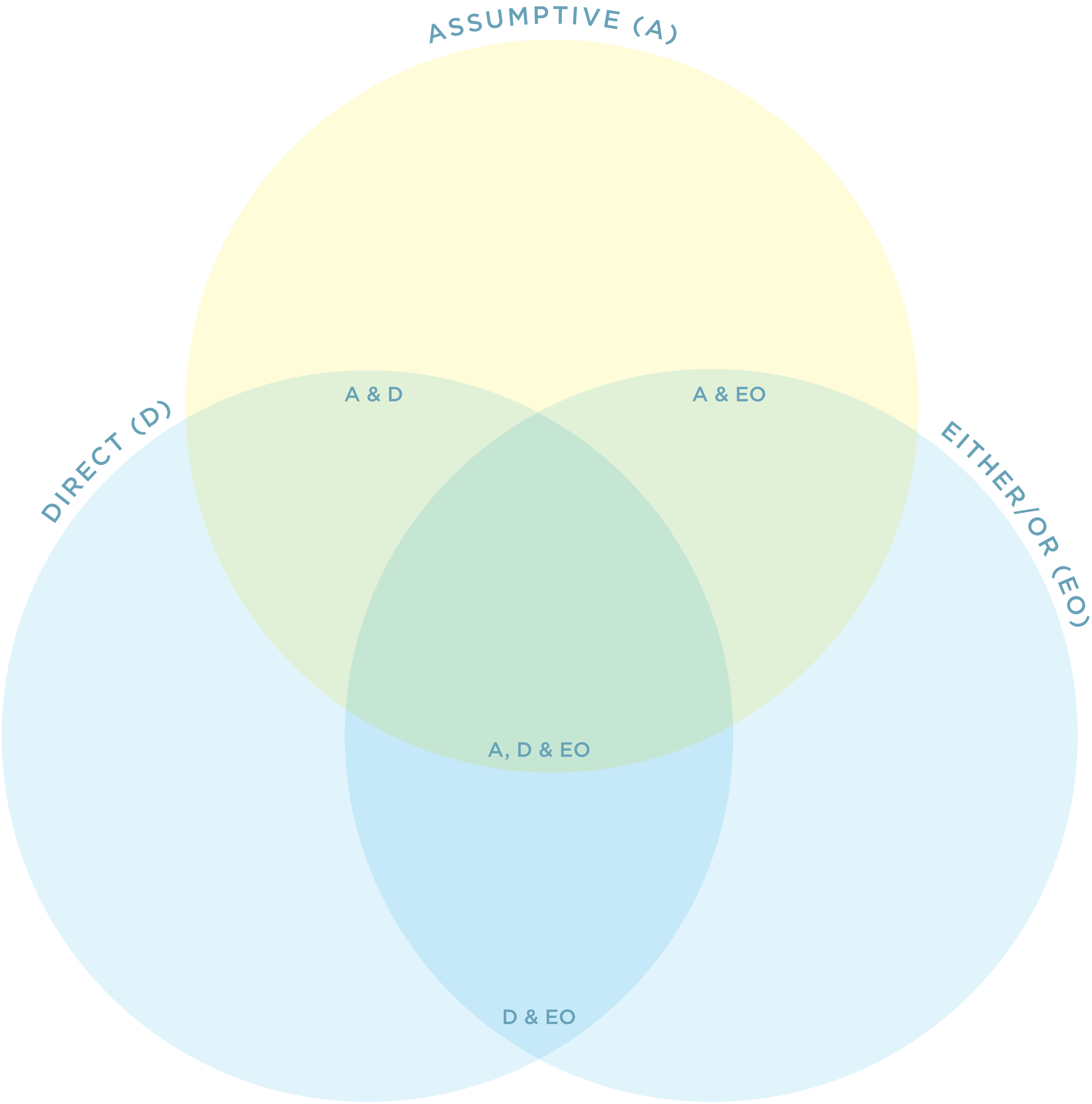
____

____

ACTIVITY 2:

DIRECTIONS: Complete the Triple Venn diagram to map the similarities and differences among the three types of Asks.

In the green center where the three circles overlap, write the ways the three types of Asks are the same.
In the blue shapes, write the ways the two types of Asks are the same.
In the Yellow shapes, write the ways the Ask is unique.



ACTIVITY 3: The Closing

DIRECTIONS: Listen to the closing conversations on BigTinCan and answer the questions for each recording.

Recording 1:

Stage of Customer Journey: ______________________________

Type of Ask: ______________________________

Outcome of Ask: ______________________________

____

Recording 2:

Stage of Customer Journey: ______________________________

Type of Ask: ______________________________

Outcome of Ask: ______________________________

____

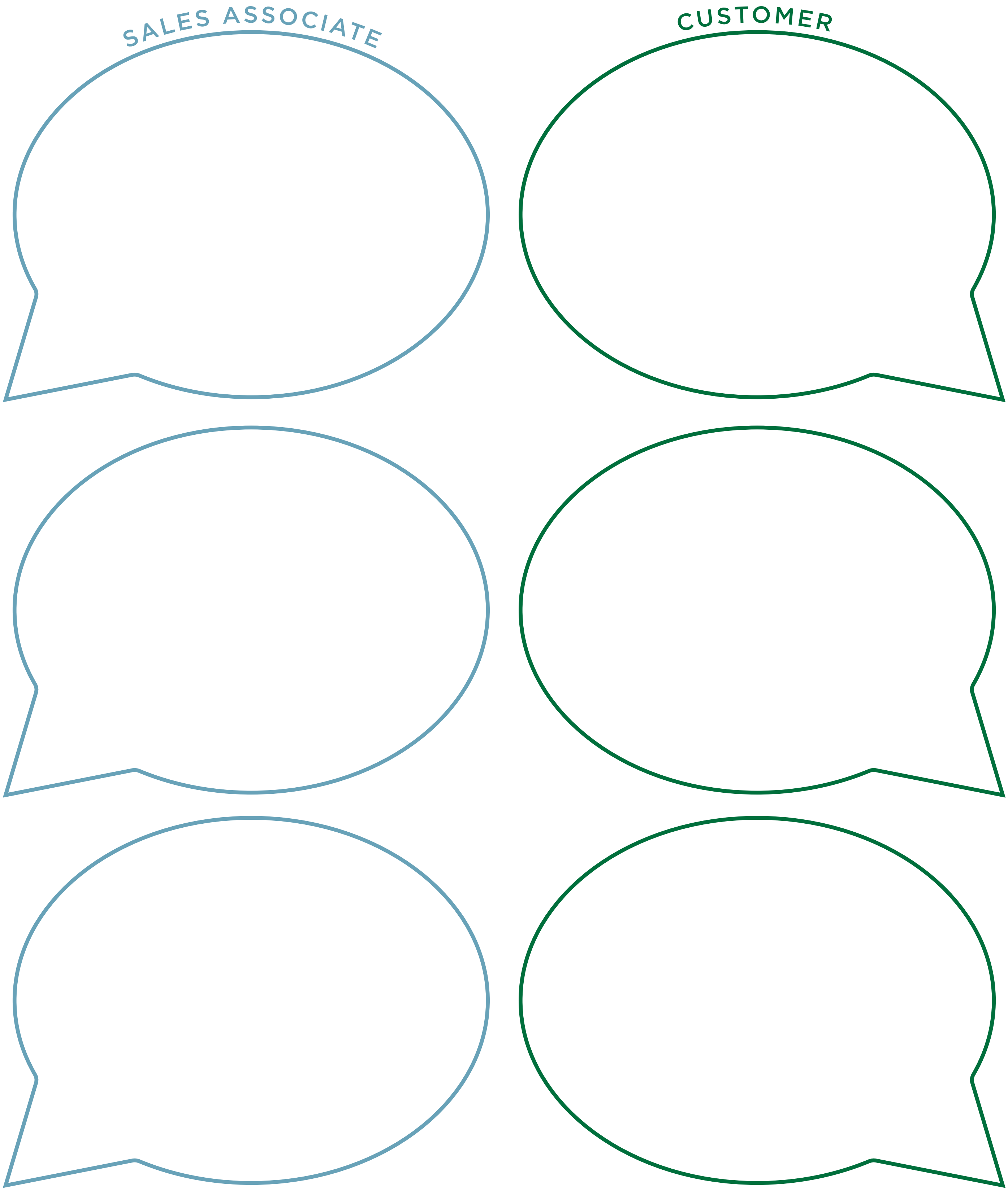
ACTIVITY 4: Rewind the Conversation

DIRECTIONS: Read the Ask and write the conversation between the Sales Associate and customer that preceded that Ask.

CONVERSATION	ASK
←	Would you like to leave a community fee for apartment 325—the one with the gorgeous view?
←	What we need to do next is schedule an assessment with our Health and Wellness Director. Would today or tomorrow work best for you?
←	

ACTIVITY 5: Plan a Conversation

DIRECTIONS: Choose one of the challenging closing conversations you identified in Activity 1: Closing Concerns and identify the best Ask to use during that conversation. Use the conversation bubbles to plan the conversation. Blue bubbles are for the Sales Associate and green bubbles are for the customer.



ACTIVITY 6: Close a Conversation

DIRECTIONS: Schedule a time with your DDS to role-play a closing conversation.

Before the conversation, send your DDS a summary of the status of your relationship with that customer. Include the stage of the Customer Journey that the customer is in, specific needs you have identified, and potential barriers you've encountered to advance them in the journey.

ACTIVITY 7: Evaluate the Conversation

DIRECTIONS: Get feedback from your DDS on the quality and content of your conversation. Use these questions:

- What was the goal of the conversation?
- What happened?
- What can I learn from this experience?
- What should I do differently next time?

> "Our residents' history creates Brookdale's future, your history creates the residents' future!"
>
> —Sales Associate, Brookdale Manilus

Overcoming Objections with CRC

Objections are just another way our customers express the need for further information.

They are an opportunity, not an obstacle.

Read the information about overcoming objections in your Sales Associate Playbook.

Access Big Tin Can and do the following:

1. Review the Overcoming Objections with CRC Quick Reference Guide (QRG).
2. Watch a video that highlights the use of CRC.
3. Listen to a conversation that highlights the use of CRC.

ACTIVITY 1: CRC Basics

DIRECTIONS: Use the information in the Overcoming Objections QRG to complete the activities and questions below.

1. Complete the graphic to define and explain the purpose of each step in CRC, and identify the outcome of each step.

	C_______________	R_______________	C_______________
EXPLANATION			
OUTCOME			

2. What is the relationship between CRC and FAB statements?

____

____

3. How does proper discovery help overcome objections?

____

4. Why is framing the conversation correctly critical to overcoming objections?

____

5. Describe a successful Sales Associate's tone of voice and body language when using CRC.

____

____

ACTIVITY 2: Why We Do What We Do and Don't Do

DIRECTIONS: Review the "Dos and Don'ts" section of the QRG.
For each "Do", write the benefits to the customer and Sales Associate when these actions are followed.

1.____

2. ____

3. ____

For each "Don't", record the unintended consequences if a Sales Associate performs these actions.

1.____

2. ____

3. ____

ACTIVITY 3: Identify Objections and CRC

DIRECTIONS: Read the transcript of the call you listened to. Underline the objection and each part of CRC in the conversation.

SA: "Are you ready to move forward?"

Customer: "No, my mom isn't like these people—they are all so "old".

SA: "Can you share more about your concerns?"

Customer: "My mom is still able to get dressed and feed herself. She still likes to have her hair done and spend time with her friends. It looks like all these people are in wheelchairs and not really doing anything."

SA: "I understand how you feel. Others have felt the same way when they first visit. What they found was that once their loved one becomes acclimated to the community, they are able to participate in our social activities and still take part in those things that bring them joy every day. In fact, many of our residents are on an outing today where they are visiting the local garden center to begin planning for our vegetable patch."

Customer: "Oh, I didn't realize there were opportunities like that here."

SA: "Yes. Knowing that our calendar is full of engaging activities and purposeful events, do you feel that we are able to overcome your concern now?"

ACTIVITY 4: Use CRC

DIRECTIONS: Read each customer scenario, identify the objection, and respond to it using CRC.

1. "The community a few miles from here is much newer and has a better feel to it. When dad walked around he mentioned several times that it didn't look or smell like an old folk's home. He liked the open spaces and the technology. He even sat in their garden and listened to the birds. When we reviewed their price, it was a bit lower than yours. I'm having a hard time understanding why you are charging more than they are."

Objection: ______________________________

Clarify/Counter: ______________________________

Respond: ______________________________

Confirm: ______________________________

2. "Our conversation with Melanie, the Health and Wellness Director, solidified that you can address my mom's medical needs. I feel great about it. Quality care is important but so is social interaction. Mom loves her weekly lunches and movies with her friends. She plans her calendar monthly. I can't see how we would be able to continue those activities and relationships if she lived here. If Marge and Mary weren't in her life, she'd be devastated."

Objection: ______________________________

Clarify/Counter: ______________________________

Respond: ______________________________

Confirm: ______________________________

3. "We think you provide great care and programs for seniors. We really like what we saw today—especially the group classes. We could definitely see ourselves here in a few years after the grandkids are a little older. Living next door to them right now makes it easy for us to see and interact with them. Elaine loves to bake cookies with Ella. Being here will limit our time with them. We don't want to miss special moments with them."

Objection: ______________________________

Clarify/Counter: ______________________________

Respond: ______________________________

Confirm: ______________________________

ACTIVITY: Role-Play Overcoming Objections

DIRECTIONS: Choose a common objection from the list below or invent one of your own.
I can't afford your community.
Your community doesn't have what I need.
It's too far from the airport or my children.
I'm not ready to give up my home.
This place is depressing.

1. Role-play with your DDS overcoming that objection using CRC.
2. Get feedback and use it in another role-play addressing a new objection.
3. Use these questions to guide your feedback:

What went well in the role-play?

____

What are opportunities for improvement?

____

What should I do differently next time?

____

____

The Financial Conversation

Your customers need you to be an expert when the financial considerations associated with living at your community are explained. To be seen as that expert, your financial conversation must address specific subjects in a pre-determined order.

Access Big Tin Can and do the following:

1. Review the Creating Value with the Financial Conversation Quick Reference Guide (QRG).
2. Listen to Audio or video of Financial Conversation

ACTIVITY 1: Preparing for the Financial Conversation

DIRECTIONS: Use the Creating Value with the Financial Conversation QRG to answer the question and complete the activities below.

Part 1: Preparing for the Financial Conversation

1. Create a checklist that specifies the information you need and the completed activities needed to prepare for the Financial Conversation with a customer.

❑ ____

❑ ____

❑ ____

❑ ____

❑ ____

❑ ____

❑ ____

❑ ____

❑ ____

❑ ____

2. How do you determine a customer is ready for the Financial Conversation?

____

____

Part 2: Much More than Money

1. Identify each step of the Financial Conversation, explain its purpose, and why that step is in that order of the conversation.

STEP	What is it?	What is the purpose?	Why is that step located in that part of the Financial conversation?
Step 1			
Step 2			
Step 3			
Step 4			
Step 5			

2. Under what circumstance can a Sales Associate remove the Care and Wellness part of the Financial Conversation? Why?

3. Instead of reciting the scripts for each part of the Financial Conversation, describe the strategy you will use to communicate each step consistently and personally with each customer?

4. What are key indicators that show the customer understands each step of the Financial Conversation?

5. Put yourself in the customer's shoes and brainstorm a list of three objections you might encounter while having the Financial Conversation. How will you overcome them?

OBJECTION 1	→	WAYS TO OVERCOME

OBJECTION 2	→	WAYS TO OVERCOME

OBJECTION 3	→	WAYS TO OVERCOME

6. What do you do to confirm the value of living in a Brookdale community?

7. Why is it important that the customer verbalizes the benefits they'll receive by saying yes to senior living?

ACTIVITY 2: The Tone and Techniques of a Financial Conversation

DIRECTIONS: Watch the video or listen to the audio of a Financial Conversation again. As you listen, take notes on the conversation and answer the questions below.

1. Circle "Yes" or "No" — Confirm each step of the conversation and summarize the Sales Associate's comments in each step.

Step 1: Benefits **Yes** **No**

Step 2: Care and Wellness **Yes** **No**

Step 3: Basic Service Rate **Yes** **No**

Step 4: Community Fee **Yes** **No**

Step 5: Annual Increase **Yes** **No**

Step 6: The Next Step **Yes** **No**

---

2. Describe the tone of the conversation.

---

3. On a scale of 1–5 with 5 representing Highly Confident and 1 indicating Lack of Confidence, rate the Sales Associate's level of confidence in having the conversation.

Lack of Confidence 1 < 2 < 3 > 4 > 5 *Highly Confident*

4. What could they do to sound more confident?

---

5. As you prepare for a Financial Conversation, what will you do to communicate the financial information with confidence and excellence?

ACTIVITY 3: Prepare a Financial Conversation

DIRECTIONS: Access your Sales Dashboard and choose a customer who is ready to have the Financial Conversation. Prepare a Financial Conversation with the customer using the discovery you conducted during your conversation and visits with them. Write down what you'll say in each step of the conversation.

Use the completed back of the Conversation Guide below to help you.

Needs	Solutions at Our Community	What This Means to You
• Medications • Fall risk • Joy in life again	• Medication management • Fall Prevention program • Optimum Life	• Peace of mind • Confidence • More smiles

Date: ________ The Value of Brookdale *Prices quoted are estimates only*	To-Do List & Next Steps
Care: $1,318.00 Basic Service Rate: $4795.00 Community Fee: $3,000 Annual Increase: 3%-6% Total Monthly Cost = $6113.00	

Customer: ____

Stage in the Journey: ____

Financial Conversation:

Step 1: ____

Step 2: ____

Step 3: ____

Step 4: ____

ACTIVITY 4: Role-Play the Financial Conversation

DIRECTIONS: Role-play with your DDS the Financial Conversation you planned in Activity 3: Prepare a Financial Conversation.

Prior to the role-play, brief your DDS on the customer's stage in the Customer Journey and why you think the customer is ready for the Financial Conversation.

After the role-play, get feedback from your DDS using these questions:

- What did I do well in the conversation?
- What are specific areas for development?
- Describe the tone of the conversation.
- How can I improve my ability to deliver the Financial Conversation?

Preliminary Review and Estimate (PRE)

The Preliminary Review and Estimate (PRE) allows appropriately trained Brookdale associates to respond rapidly and provide solutions to meet the customer's preferences and needs including a timely Personalized Care Estimate. This tool displays an outline of services, preferred and/or needed by the prospect and topics that require attention.

The PRE does not replace the assessment/evaluation or service/care planning processes. Actual services and charges are confirmed based on the Personal Service Assessment, the Physician Plan of Care, and the Personal Service Plan.

There are several reference materials that support your learning and use of the PRE. Schedule time to read each one. As you go through these documents, highlight areas that require clarification and generate a list of questions to ask a peer, your HWD, or your DDS.

Access BigTinCan and download the following:

- Preliminary Review and Estimate Quick Reference Guide (ORG)
- Preliminary Review and Estimate (PRE) Ladder
- Preliminary Review and Estimate (PRE) Process Policy
- Brookdale Senior Living – Personal Service Assessment and Personal Service Plan Interpretive Guidelines
- Completed PRE for Chrissy Hynde

Go to BSLnet and follow the instructions on the Preliminary Review and Estimate (PRE)—Printing Quick Reference Guide and download the PRE for your community.

Complete the following LMS Courses:

- SALES1023: PSS – Customer Journey
- SALES1024: PSS – Value Equation
- SALES1025: PSS – Preliminary Review and Estimate
- SALES1026: PSS – Case Study

TIP: Compile a PRE binder that contains all the documents needed to execute a PRE. As time allows, review these documents to deepen your understanding and ability to complete a PRE.

ACTIVITY 1:

DIRECTIONS: Review the completed PRE for Chrissy Hynde.

Cross-reference the selection in each Care Category with Brookdale Senior Living—Personal Service Assessment and Personal Service Plan Interpretive Guidelines and answer the questions below.

1. What type of community is Chrissy considering?

___

2. How much assistance does she require with medications?

___

3. What is Chrissy's weekly bath and shower routine?

___

4. How often does Chrissy receive physical therapy outside the community?

___

5. How does a care associate help Chrissy with her smoking?

___

6. What is the Preliminary Care Estimate for Chrissy?

___

___

Record any questions you have about Mrs. Hynde's PRE.

1.___

2. ___

3. ___

Review your questions with your DDS or ED.

ACTIVITY 2: Observe a Peer Conduct a PRE

DIRECTIONS: Call the Sales Associate in your sister community and schedule a time to observe them conducting a PRE.

Use the graphic below to take notes as you observe the process. Discuss your observations and questions with the Sales Associate after they have completed the PRE and the customer has departed.

TIP: Make sure the Sales Associate you observe explains your participation and presence during the PRE. They might mention, “Brookdale values Sales Associate excellence and you’re observing an expert at work to learn best practices.” Letting the customer know this information before the PRE begins creates a comfortable setting for everyone involved.

TOOLS/PROGRAMS

BRIGHT IDEAS/TIPS

MEMORABLE QUOTES FROM THE CONVERSATION

QUESTIONS

ACTIVITY 3: PRE Practice with the HWD

Part 1: Watch

DIRECTIONS: Make an appointment with your HWD to observe them conducting a PRE using the case study below. Take notes and ask questions as they work. All questions are good questions!

TIP: Print at least two copies of your community's PRE before doing these activities.

Personal Service System (PSS)

PRE - Inquiry Case Study

Brookdale Place Sunnyside is an 80-apartment Assisted Living community with a 12-apartment Memory Care neighborhood. Today Eve Morgan, daughter of Connie Sharp came into the community to look for a place for her mother. Connie fell while at home and has been in rehab for the last six-weeks after hip replacement surgery. Eve visited a friend of her mother's at the community this weekend and is here to meet with the Sales Manager.

After establishing a personal connection; Eve shares the following with the Sales Manager:

Connie is making great progress at rehab and Eve is considering Assisted Living. Eve has been providing more and more routine care to her mom and with her job and grandkids…it is getting tough!

When living at home, Connie needed help with managing her medications and with showers. Connie will require her weight to be monitored weekly due to increased swelling (edema) in both legs related to a Heart Failure diagnosis (HF). She is on continuous oxygen at two-liters per minute and she controls the dials and monitors herself. She currently takes eight medications including Hydrocodone for hip pain. She had an allergic reaction to Percocet after the surgery.

Connie will need Physical Therapy (PT) for gait, balance and strength training as well as Occupational Therapy (OT) for dressing assistance. Eve stated her Mom will need occasional assistance with buttons and zippers when getting dressed due to her arthritis.

Connie is able to complete her toileting herself. She wears incontinent pads which control her minor "dribbling" and Eve has been buying her supplies as needed (but would be happy to have the task taken off of her shoulders).

Connie likes to shower about three-times per week on Tuesday-Thursday-Saturday usually when she first gets up at 6 a.m. She will need to be physically assisted in and out of the shower and wants someone with her as she washes herself. Connie sits during the shower on her shower chair. She goes to the beauty salon every Saturday, so does not want her hair washed during her shower. She prefers Caress body wash during showers and needs assistance with applying her favorite Bath and Body Works lotion that Eve brings in prior to getting dressed.

Connie has experienced depression during her recovery time and is now taking Wellbutrin twice a day for the depression and smoking cessation. Connie has a dog- Lucky and is unable to completely take care of him, Eve has been keeping him, but Connie will want him once she moves in.

Part 2: Do
DIRECTIONS: Switch roles with your HWD and have them observe you complete a PRE using another case study. Get tips and feedback from the HWD as you work.

PRE Case Study
Brookdale Torrance is a 65-apartment Assisted Living community. Today, Thom Schiller, husband of Taylor Schiller, visited the community to look for a place for himself and his wife. Taylor, a lifelong smoker suffers from COPD. The adventurous duo has traveled the world, but Taylor's breathing has slowed them down. Thom feels like Taylor needs more care than he can do at home.

After establishing a personal connection; Thom shares the following.

Taylor's COPD is exacerbating. She requires respiratory therapy three times a week. In addition, Taylor takes medication for her high cholesterol and erratic heartbeat. She is able to take the medicine orally, but needs help taking it as directed and on schedule.

Taylor's pulmonologist recommends that she exercise moderately at least three times a week. When Thom tries to help her go for a walk or do a few chair exercises, Taylor gets exhausted and Thom gets frustrated. As a result, the doctor has prescribed physical therapy for 30-minutes twice a week.

Taylor uses oxygen on an as-needed basis. Due to failing eyesight, Thom manages the dials for her. Thom fears Taylor will smoke with the oxygen present.

Taylor is very conscientious of her physical appearance. A former model, she dresses impeccably and watches her caloric intake. Occasionally, she feels light headed due to lack of sustenance. Taylor follows a special diet plan developed by a nutritionist recommended by her GP. The dairy-free plan also helps with Taylor's lactose intolerance.

Taylor completes toileting herself, and is very concerned with her personal hygiene. She showers every day after breakfast and applies her makeup at the dressing table she inherited from her grandmother. Taylor uses only hypoallergenic facial cleansers and make up due to excessively dry and flaky skin. Her dermatologist has prescribed an over the counter cream to address her skin concern.

Thom is grateful that Taylor can dress herself. He loves to see her all gussied up. On good days, they go out to lunch or dinner. After 40 years of marriage, Thom and Taylor are still very much in love.

Part 3: Reflection

DIRECTIONS: Complete these sentence starters to process your execution of the PRE in Part 2: Do of Activity 3.

1. I am feeling... ______________________________

____

2. Assistance I need to implement the PRE is...______________________________

____

3. Something I have been doing I need to change is... ______________________________

____

4. A follow up action I need to take is...______________________________

____

5. What is still missing for me is... ______________________________

____

6. Something I want to remember is...______________________________

____

ACTIVITY 4: Role-Play

DIRECTIONS: Send your DDS a completed VEPT to review. Using the customer information on the VEPT, conduct a role-play on the PRE you have prepared for an upcoming visit.

Use these questions to get feedback from your DDS on the role-play.

Customizing Care for Our Customers

The Personal Service System aligns associates' actions with the needs and values of the customer better and faster than the competition.

Access BigTinCan and read Personal Service System infographic.

ACTIVITY 1: Get to Know the Personal Service System

DIRECTIONS: Review the Personal Service System infographic and answer the following questions.

1. How does the PSS impact your role as a Sales Associate?

____

2. Identify five ways the PSS creates customer care solutions.

   1. ______________________________________
   2. ______________________________________
   3. ______________________________________
   4. ______________________________________
   5. ______________________________________

3. Define four specific parts of the PSS and create a FAB statement for each one.

   1. Part of the PSS: ______________________________

      Feature: ______________________________

      Advantage: ______________________________

      Benefit: ______________________________

   2. Part of the PSS: ______________________________

      Feature: ______________________________

      Advantage: ______________________________

      Benefit: ______________________________

3. Part of the PSS: ______________________________

   Feature: ______________________________

   Advantage: ______________________________

   Benefit: ______________________________

4. Part of the PSS: ______________________________

   Feature: ______________________________

   Advantage: ______________________________

   Benefit: ______________________________

4. At what point in the Customer Journey would you use the PSS? Why?

____

5. Write three questions you have about the PSS.

1. Question: ______________________________

   Answer: ______________________________

2. Question: ______________________________

   Answer: ______________________________

3. Question: ______________________________

   Answer: ______________________________

6. Call a Sales Associate in a sister community and ask them the questions you created in Question 5. Write the Sales Associate's answers underneath each question.

Notes

BROOKDALE UNIVERSITY OF SALES

EST. 2019

OWNING YOUR *Neighborhood*

"Actions open doors. Consistency keeps them open!"

—Sales Associate,
Brookdale Medi Park West

After completing Own Your Neighborhood, you'll be able to:

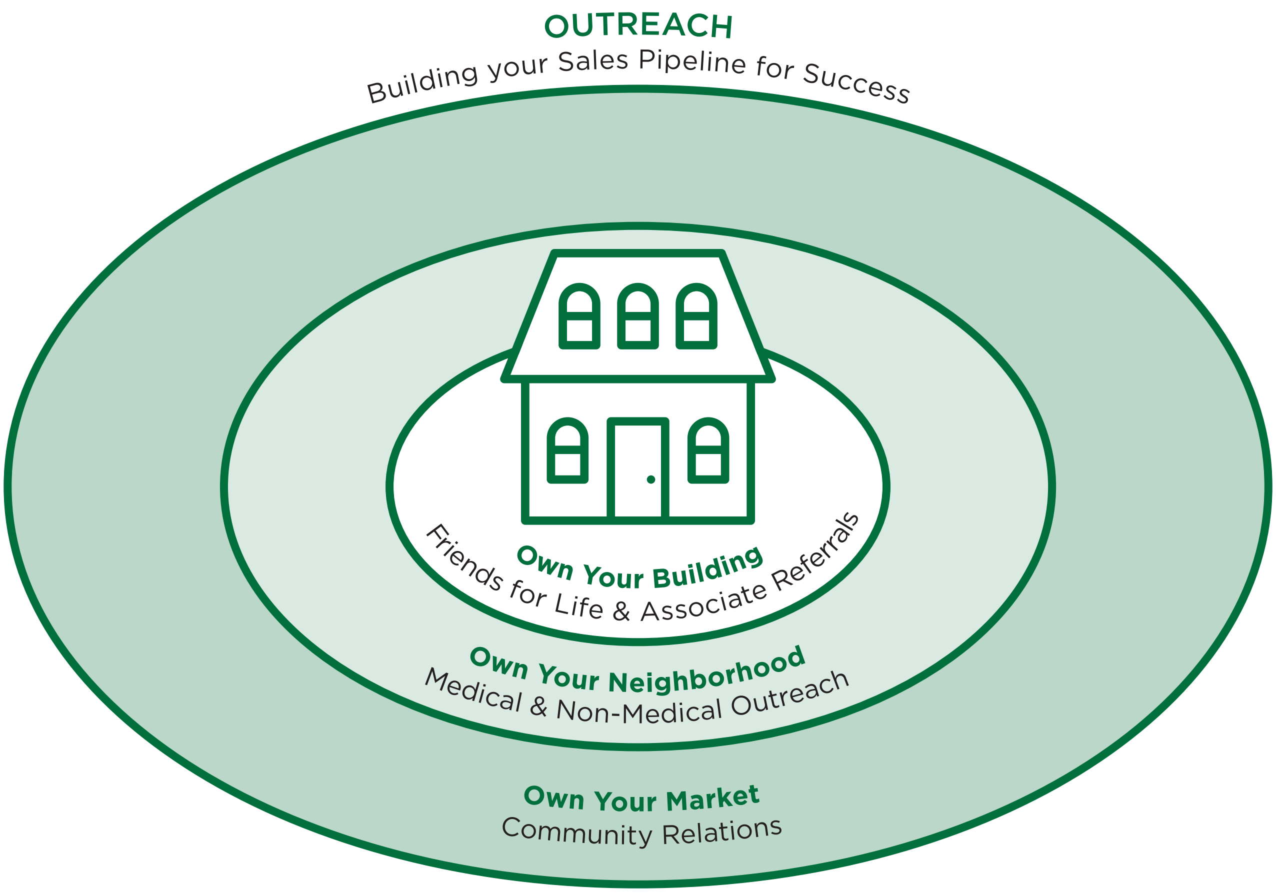
- Outline the daily schedule of a Sales Associate
- Explain Brookdale's strategy to own your neighborhood
- Utilize the Friends for Life program to generate referrals
- Interpret data from the Sales Dashboard to formulate sales plans and actions
- Incorporate Competitive Intelligence into internal and external sales efforts
- Develop and execute plans for medical and non-medical outreach
- Apply a systematic approach to network and own your market

Owning Your Neighborhood

The goal as a sales associate is for you to own your neighborhood. Leveraging your professional network as well as community and building related networks enables you to develop a list of referrals that will assist in achieving your sales goals.

To help own your neighborhood, Brookdale's sales strategy focuses three tactical target markets: your building, your community, and the market in your neighborhood.

Because each market is unique, you'll follow different methods and approaches to develop relationships within them. These methods are Brookdale tested and Sales Associate approved. They work well, so use them!



Friends for Life

Friends for Life (FFL) is a program to encourage residents to tell their family and friends about living at Brookdale. For each referral that moves into a community, the current (referring) resident receives a monetary award. This award is either given as a credit on their monthly invoice, or as a physical check.

Access BigTinCan and do the following:

1. Read Friends for Life (FFL) Checklist and Friends for Life Request Form.
2. Review FFL marketing and promotional materials.
3. Read Best at Basics March SM Materials

ACTIVITY 1: Friends for Life Fuels Your Pipeline

DIRECTIONS: After reviewing the Friends for Life Checklist and Friends for Life Form, answer these questions:

1. Why does Brookdale have a Friends for Life Program?

2. How does FFL help current residents?

3. How does a strong FFL program impact your sales pipeline?

4. Who are the key leaders/associates in your community to assist with promoting FFL?

What will you ask them to do?

5. How can you leverage existing relationships with residents for more referrals?

6. Describe specific ways you will include FFL in your daily workflow.

ACTIVITY 2: Finding Friends for Life

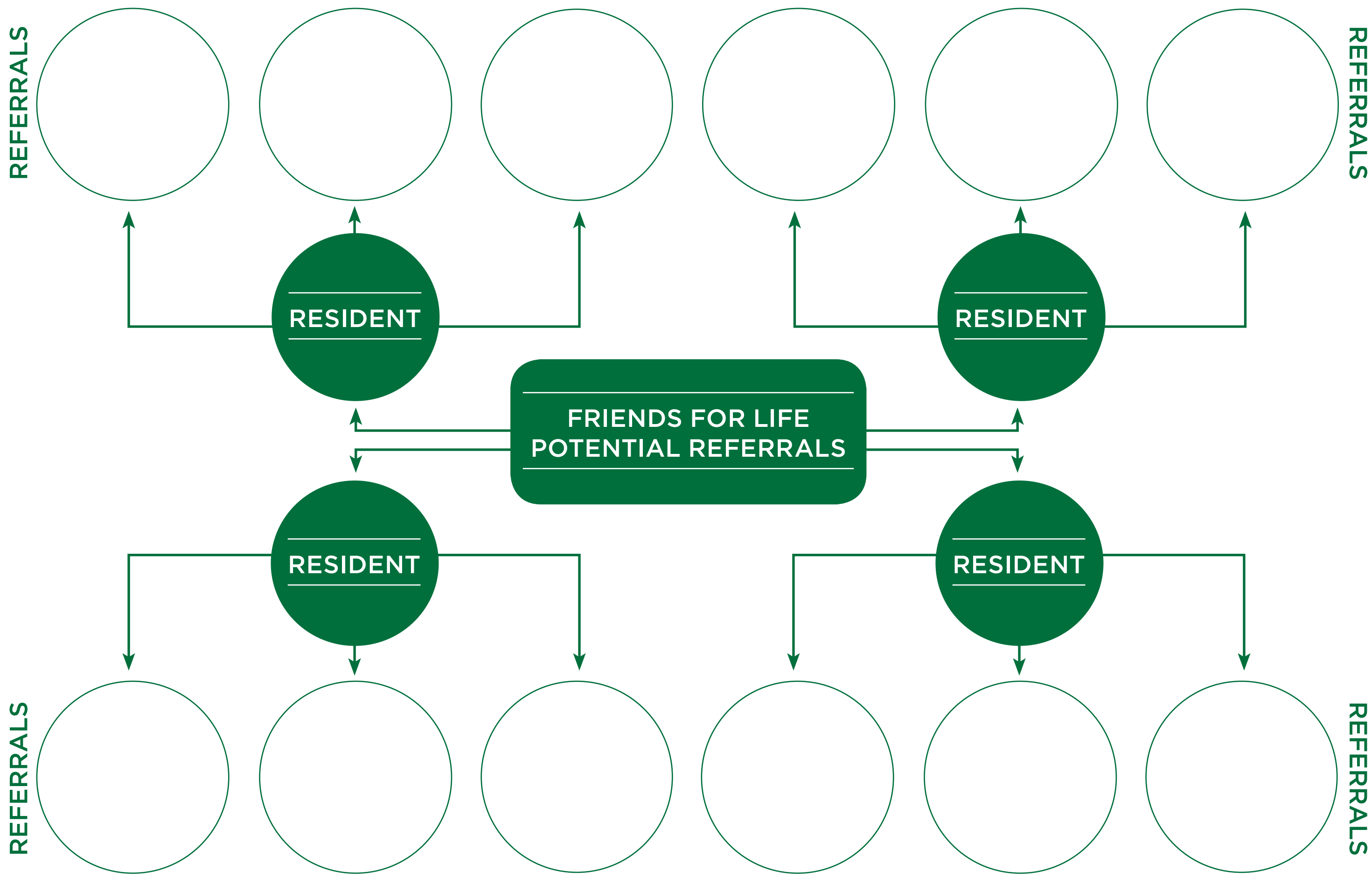
DIRECTIONS: Work with your Resident Programs Director or Clare Bridge Programs Leader to identify 2–3 current residents that would be great Ambassadors for Friends for Life in your community. Schedule a special lunch with each of them and share the Friends for Life program.

During lunch, have the resident:

- Describe their favorite things about living in the community.
- Tell a story that highlights their happiness as a resident.
- Discuss people in their sphere of influence including family members, friends, doctors, therapists, former co-workers that might benefit from the joy and comfort of living at a Brookdale community. Use the Friends for Life Relationship Map below to record their potential referral sources.
- Ask the resident if they would like to be an Ambassador for Friends for Life. **Include in your ask specific reasons why you think the resident would be a great Ambassador and how the role would benefit them. Also mention the time requirements.**

If your community has existing Ambassadors, schedule lunch with them.
During lunch, discuss as a group:

- Their favorite things about living in the community.
- Stories that highlight their happiness as residents.
- Their role and responsibilities as Ambassadors.
- Ideas to create more Friends for Life.



Use this map to document potential referral sources residents and FFL Ambassadors share during your lunches with them.

ACTIVITY 3: Host a Friends for Life Event

DIRECTIONS: Plan and host a Friends for Life event in your community.

1. Go to the Brookdale Sales Facebook page and ask your peers for ideas and themes for your Friends for Life event. Encourage your peers to share photos of events they had that were successful.
2. Connect with the Sales Associate in your sister community to shadow a FFL event at their community. If an event isn't scheduled, ask the Sales Associate for tips and ideas for a successful event. In your conversation, inquire about a list of "what to avoid" during FFL events.
3. Meet with your ED, Resident Programs Manager, and FFL Ambassadors to plan the event.
4. Use this framework to guide your planning process.

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FFL Event Plan

Event Date ______________________

Theme ______________________

Event Team ______________________

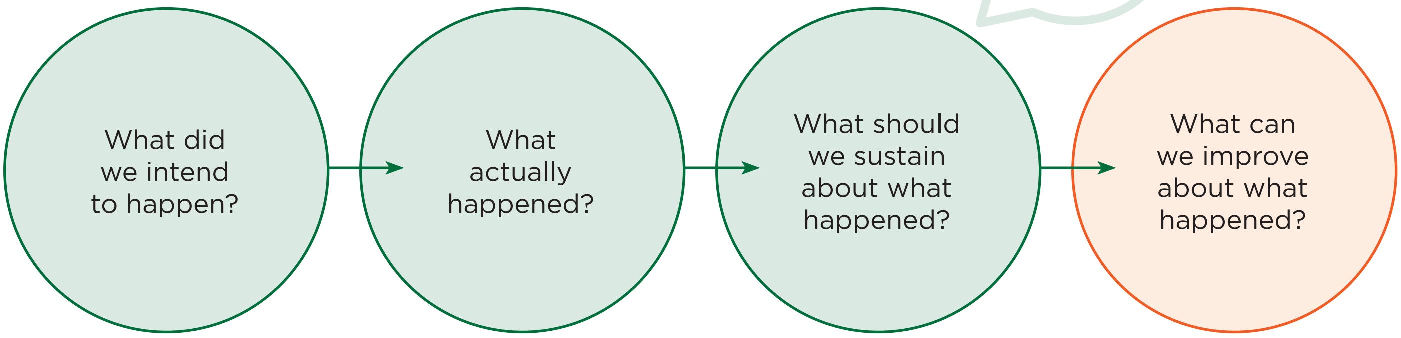
Program ______________________

Guests ______________________

Follow Up ______________________

ACTIVITY: Conduct an After Action Review

DIRECTIONS: Participate in an After Action Review of the FFL event with your DDS. Be prepared to answer these questions in your conversation.



Competitive Intelligence

Competitive Intelligence (CI) is a centralized computer database for Brookdale Senior Living Sales Associates. It serves as a tool that enhances information accessibility, decision-making, and supports and adds value inside and outside of our community walls.

Access and read CI documents on *enrichelives.service-now.com* at the following link:
Knowledge > Sales Systems (Knowledge Base) > Competitive Intelligence

- What is Competitive Intelligence?
- How to Update Brookdale Community Profiles
- How to Update a Competitor Profile
- How to Use the Price/Value Comparison
- What Reports are Available in Competitive Intelligence?

ACTIVITY 1: The Facts

DIRECTIONS: After reading the CI overview on the ServiceNow website, answer the questions below:

1. What is Competitive Intelligence (CI)?

___

2. Why is it important?

___

3. What are the two view types in CI? Which one do you have?

___

4. What are the features of the CI database?

___

5. How does the data presented in CI help your performance as a Sales Associate?

___

6. When does a Sales Associate use CI?

___

ACTIVITY 2: Side-by-Side

DIRECTIONS: Schedule a meeting with a Sales Associate in a sister community and have them demonstrate how they access and use Competitive Intelligence to plan their sales strategy and events. Use this checklist and questions to ensure you experience a thorough review of the CI database. Ask the Sales Associate do the following:

1. Access the database.
2. Determine Market or Community View and explain the difference.
3. Access Google Map and show locations of Primary, Secondary, and Under Construction competitors as well as other Brookdale communities.
4. Why is this information important? How do I use it?
5. Review the Competition Summary Report, Market Summary Report, Pricing Summary Report, Unit Summary Report, and Services and Service Fees Reports.
6. Complete the chart below during your review.

Competitive Intelligence

DIRECTIONS: Use this chart to identify the purpose, use, and benefits of each report in the Competitive Intelligence database. In the last column, write one tip to help you use the reports effectively and efficiently.

Type of Report	What is the purpose of the report?	How do I use the information?	What comments or concerns from a customer does the information help you address?	Tip to better use the information in the report
Competition Summary Report				
Market Summary Report				
Pricing Summary Report				
Unit Summary Report				
Service and Service Fees Report				

ACTIVITY 3: Using Competitive Intelligence

DIRECTIONS: Read each scenario and answer the questions that follow it.

1. You have been working with Zara, Cara's daughter, to find a senior living solution for Cara. Both Cara and Zara visited your community. As they walked around, Zara mentioned that your community looks older than Great Living, the new community they visited prior to meeting with you. Zara agrees with her mom and inquires about the difference between your community and Great Living.

What competitive intelligence would help you address this customer's complaint?

____

How would you present the information to the customer?

____

____

2. A customer has visited your community and the Sunnyvale Assisted Living three blocks away. During a second visit to your community, the customer complains that the apartment at Sunnyvale is larger and less expensive than the apartment you showed them.

What competitive intelligence would help you address this customer's complaint?

____

How would you present the information to the customer?

____

____

3. You are planning to attend a networking event. In the past two months, a new AL and a new MC community have opened five miles from your community. They have been aggressively promoting move-in specials and discounted rates on TV, in the newspaper, and in the Chamber of Commerce monthly newsletter. As a result, there is lots of interest and conversation about these communities.

To help you prepare for your networking event, what Competitive Intelligence reports would you use?

____

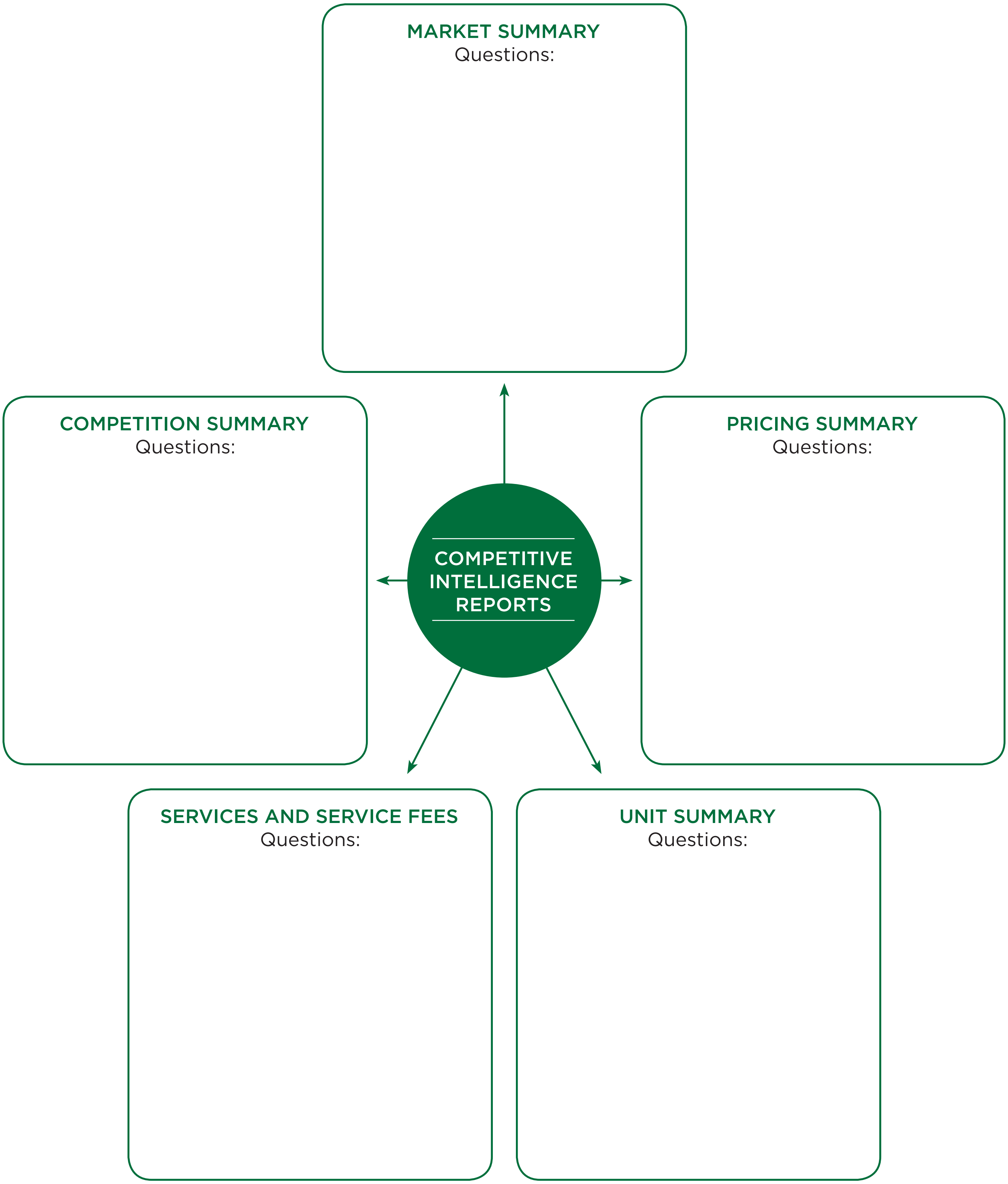
How would you use the information to inform your objectives for the networking event?

____

____

ACTIVITY 5: Thinking Ahead

DIRECTIONS: Review each Summary Report from the Competitive Intelligence database. Use the graphic to brainstorm three customer questions that each report addresses and answers.



ACTIVITY 6: Get Answers

DIRECTIONS: Make a list of at least five questions about CI to ask your DDS during your upcoming 1:1. Send the list to your DDS prior to the conversation to give them time to prepare their responses.

1. Question: ______________________________

   Answer: ______________________________

   ____

2. Question: ______________________________

   Answer: ______________________________

   ____

3. Question: ______________________________

   Answer: ______________________________

   ____

4. Question: ______________________________

   Answer: ______________________________

   ____

5. Question: ______________________________

   Answer: ______________________________

   ____

ACTIVITY 7: Shadow Your DDS

DIRECTIONS: Have your DDS demonstrate how to use the CI database to gather Competitive Intelligence on a community in your neighborhood. Write down their process and ask questions along the way.

ACTIVITY 8: Use the CI Database

DIRECTIONS: Gather CI on another competitor in your neighborhood while your DDS observes.

1. Demonstrate each step of the process and explain why you are doing it.
2. Once you have gathered the information, cite three ways you'll use the information you gathered.

A Day in the Life

One of the best ways to get to know your new role is to shadow another Sales Associate in a different community.

Shadowing another Sales Associate enables you to experience the flow of a day in their life. It gives you the opportunity to observe and ask questions about the significant actions, conversations, and responsibilities that make a Sales Associate successful.

During the visit, you'll develop a relationship with a peer who "walks in your shoes". Building a relationship with a peer benefits you by having a resource to answer questions, a partner to hold special events, and a referral source when your community doesn't meet the needs of a customer.

ACTIVITY 1: Prepare for A Day in the Life

DIRECTIONS:

1. Contact your DDS and confirm the name of the community and Sales Associate you'll visit.
2. Call the Sales Associate to explain the purpose of your visit and schedule it.
3. Alert your ED and DDS that you'll be out of the community on the day of the visit.
4. Work with your ED to equip the A-Team to handle any calls or drop-by visits.

ACTIVITY 2: Participate in A Day in the Life

DIRECTIONS: Visit the sister community. Use the chart on the next page to document your experience.

During your first visit, you may not experience all of the activities on this map. That's OK. You'll conduct another visit to the community where you can add to the map.

ACTIVITY 3: Follow Up Call

DIRECTIONS: After your visit, schedule a call with your DDS to review the "Day in the Life" experience.

ACTIVITY 4: Thank You

DIRECTIONS: Send a thank you note to the Sales Associate you shadowed during the Day in the Life. In your note, specify a few things you witnessed that were memorable and informative.

A Day in the Life: My Visit to a Sister Community

DIRECTIONS: Use this chart to identify activities you experienced and record your observations about them. Fill the empty spaces with additional activities you observed. Record any questions you have about your visit and discuss them with the Sales Associate before you depart.

First Impressions	SMS	The Dashboard	Stand Up Meeting
Hot Board	**VEPT**	**Introductory Call**	**Conversation Guide**
Financial Conversation	**Scheduled Visit**	**Drop By Visit**	**FAB**
Discovery	**Outreach**	**Personal Connections**	**A-Team**
CRC			

The Sales Dashboard

The Sales Dashboard is your single source of truth for goals and data.

Using it enables you to view and keep track of your individual goals and monitor your pipeline health. It is accessible through Tableau on BSLnet.

Review the Sales Associate Dashboard Job Aid.

To access the Job Aid:

1. Go to *enrichlives.service-now.com*
2. Find the search box in the center of the page beneath "Knowledge Search."
3. Type "Sales Associate Dashboard Job Aid" and hit the Return key.
4. Scroll down to find the Sales Associate Dashboard Job Aid.

Read the information about the Sales Associate Dashboard in your Sales Associate Playbook.

Access BigTinCan and do the following:

View the "Our Customer" and "Using the Dashboard" videos.

ACTIVITY 1: Using the Sales Dashboard

DIRECTIONS: Use your Sales Dashboard to answer the following questions:

1. What specific information is contained on the Sales Associate Home tab?

____

2. Why is the data in the Sales Dashboard significant?

____

____

3. How are the Week-to-Date goals related to the Month-to-Date goals?

____

____

4. What are the three types of information in the Community Customer Dashboard?

____

____

____

5. How do you locate the number of active leads in the Engage stage of the Customer Journey?

What actions would you take with those customers?

6. How do you access a list of names of all the customers in the Interest stage of the Customer Journey?

What does that information help you do?

7. What is the purpose of Customer Scenarios in each stage of the Customer Journey?

How do the definitions in each scenario help you?

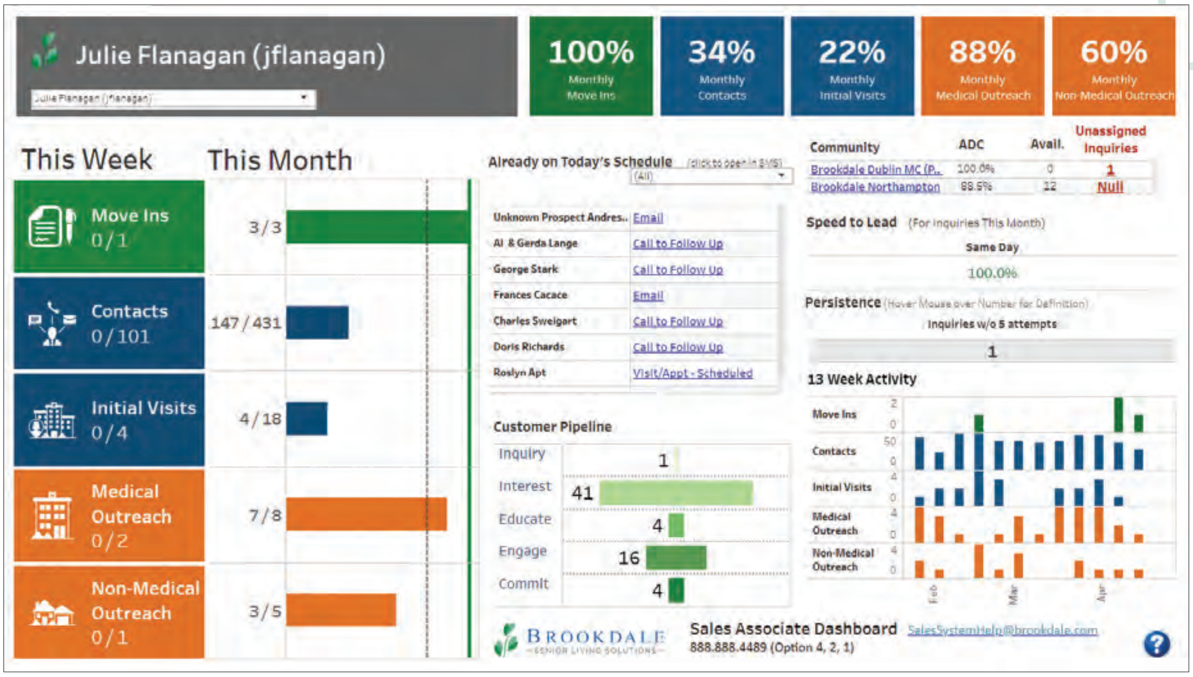
8. What are three ways the Sales Dashboard helps you manage your time?

How do lead scores affect your daily planning?

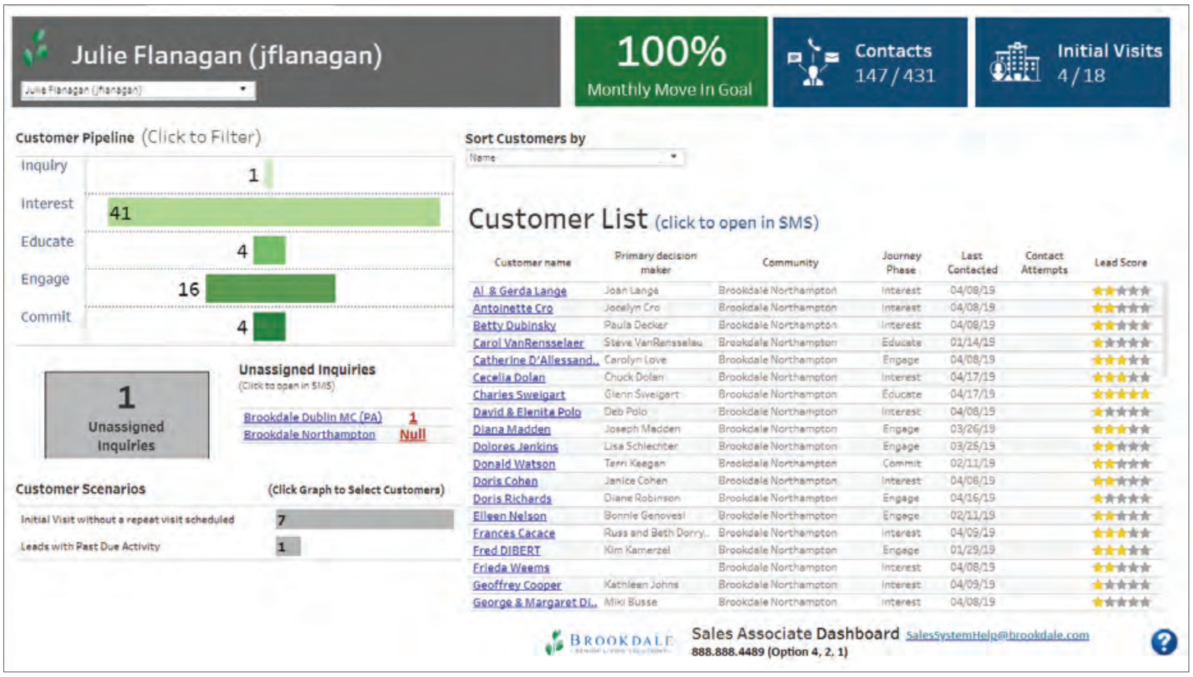
ACTIVITY 2: Interpret a Sales Associate's Dashboard

DIRECTIONS: Review the Sales Associate's Dashboard information and answer the questions below.

Sales Associate Home Dashboard



Sales Associate Customer Dashboard



1. What are Julie's monthly Move-In and Customer and Outreach goals?

2. What activities should be included in her schedule for today?

3. Based on the numbers of customers in each stage of the Customer Journey, what can you infer about this Sales Associate's pipeline?

What actions would you recommend?

4. What is the impact of having Community Pending Leads?

5. How would you prioritize this Sales Associate's daily schedule? Explain your reasoning.

6. What additional recommendations do you have for Julie?

ACTIVITY 3: DDS Review

DIRECTIONS: Discuss your answers to Activity 2: Interpret a Sales Associate's Dashboard with your DDS. Get feedback on your answers and ask your DDS to provide additional insights based on their assessment of Julie's Dashboard.

Medical and Non-Medical Outreach

Neighbors, Referrals, and Your Pipeline

Customers learn about Brookdale through friend/family referrals, the web, professional referral sources, advertisements, and brand activities.

After their initial discovery, customers can arrive at a community through several avenues. Customers can call in or walk in directly to our community.

They can submit a web form and one of our national lead aggregators will prequalify the lead for us and then send them our way.

In all of those instances, you are relying on other people and processes to determine your referral pipeline and ultimately, your sales success. Take control of your pipeline by focusing on these three areas of referrals: friend/family, medical professionals, and non-medical professionals.

Access BigTinCan and do the following:

1. Read the Own Your Neighborhood Quick Reference Guide (QRG) and the Community Outreach Checklist.
2. Review the Live, Work, Play Worksheet.
3. Review the Professional Visit Experience Planning Tool.
4. Read Community Outreach in the Sales Associate Playbook.

ACTIVITY 1: Reflect, Adjust, Do (RAD)

DIRECTIONS: Think about your current outreach strategies and answer the questions below:

On a scale of 1–5, with 1 indicating weak and 5 very strong, rate the strength of your referral pipeline. Circle your answer.

1 2 3 4 5

Explain your rating.

2. List your current actions to build your pipeline. Put a star next to the actions that are producing the most results.

3. Compare and contrast your existing actions and the outreach recommendations in the Own Your Neighborhood QRG.

	Current Actions	Recommended Actions	Adjustments
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

4. To maximize your time and increase referral results, what do you need to include or delete from your current outreach efforts? Make your adjustments directly on the chart in Question 3.

4. Categorize your current referral sources and the amount of time you currently invest in nurturing relationships with these partners.

	GOLD	SILVER	BRONZE
Referral Sources			
Time Invested			

ACTIVITY 2: Interview a Resident

DIRECTIONS: Prepare and interview a resident or their family member to determine where they Live, Work, Play.

1. Make a list of key residents and family members in your community who you can interview for prospective referrals.
2. Brainstorm probing questions to use during the interview to identify specific names of potential referrals. For example:

   Tell me about your primary care doctor.
   What makes that person special?
   OR
   What's your favorite part about living here?
   Based on how you feel about living here, who do you think would enjoy Brookdale as much as you do?

   Questions:____

   ____

   ____

> **TIP:** As you develop your questions, make them conversational. Knowing key things/qualities of a possible referral enables you to engage them on a personal level to make a great first impression.

3. Interview a current resident (and/or their family member) and use the probing questions developed in Step 2 to map where they and their adult children live, work, and play. Use the Live, Work, Play Worksheet on the next page to document their answers.

LIVE, WORK, PLAY

We love to engage with our residents' larger network of connections to introduce Brookdale and to continue building our relationships in the broader community.

Physician: ______________________ Phone# __________

Business Location: ______________________ City: __________

Physician: ______________________ Phone# __________

Business Location: ______________________ City: __________

Physician: ______________________ Phone# __________

Business Location: ______________________ City: __________

Dentist: ______________________ Phone# __________

Business Location: ______________________ City: __________

Financial Advisor: ______________________ Phone# __________

Business Location: ______________________ City: __________

Attorney: ______________________ Phone# __________

Business Location: ______________________ City: __________

Accountant: ______________________ Phone# __________

Business Location: ______________________ City: __________

Clergy: ______________________ Phone# __________

House of Worship: ______________________ City: __________

Professional/Civic Organization: ______________________ Phone# __________

Business Location: ______________________ City: __________

Professional/Civic Organization: ______________________ Phone# __________

Business Location: ______________________ City: __________

Social Club Name: ______________________ Phone# __________

Business Location: ______________________ City: __________

BROOKDALE
SENIOR LIVING

ACTIVITY 3: The Professional Visit Experience Planning Tool (PVPT).

DIRECTIONS: Review the completed PVPT below and answer the questions that follow it.

BROOKDALE
SENIOR LIVING SOLUTIONS

Professional Visit Planning Tool

BASIC INFORMATION	
Organization Name: University Hospital, Joint & Spine Center **Point of Contact & Title:** Julie Moorer **Company Contact Information** **Address:** 567 E. Rainier Blvd. **Phone:** 206-688-4545 **Email:** jm@uhosp.org	**Referral Tier:** NEW **Priority Targeted Organization?:** Yes **Date of Visit:** 9/18/2018

MEETING PREPARATION	
Current Resident Relationships	Kelly Shans, admitted this week
Past Resident Relationships	na
Background Information (Do your research!)	UniHosp has been in the market for several years. Owned by MedStar "It's How we Treat People", Wellness Program called GLOW for women and GoldenCare for seniors over 62; formed an alliance with 3 regional hospitals in 2011, 2012. Has Birth Center, Breast Center; Joint & Spine Center Grand Opening was last month,

MEETING STRATEGY	
Meeting Objectives	*(What is the stated purpose of the meeting? Is the value to the professional clearly defined and communicated?)* Develop relationships with new discharge planners, partner together for educational events to benefit larger community, Gain contact for Golden Care for future partnership
Who's going with you?	*(List out any A-team members that are going with you and what their role will be during the meeting.)* Heidi, HWD
Information to Gain	*(What is needed to help you identify win/win scenarios between you and this contact?)* Their discharge/referral process? Do they have niche population? Specialty docs?
Insights to Share	*(What updates or information do you plan on sharing with/knowledge of Brookdale?)* Caregiver respite program, Brookdale CEU's, HomeVisit program, Make sure they have direct contact info for referrals to generate quick dc plans.
Collateral	*(What tangible items are you taking with you that could be a source of value to the professional?)* Respite Program flyer, Business card with Rapid Referral magnets
Next Step/ Target Outcome	Good – Return visit with CE flyer details Better – Follow up appt with GoldenCare Coordinator for next week Best – Schedule visit with Julie to visit our Bkd community to discuss plans for joint educational event

Section 1: Basic Information

1. How does knowing the current Referral Tier impact your objectives for the visit?

____

2. How do you determine a Priority Targeted Organization?

____

Section 2: Meeting Preparation

1. What is the benefit of including information on current and past relationships with that organization in your visit?

____

2. How can you access information about the organization?

____

Section 3: Meeting Strategy

1. How do clear meeting objectives benefit you and the organization you'll visit?

---

2. How do you select and prepare A-Team members to go with you on the meeting?

---

3. How do you determine the information you want to gain during the visit?

What are the advantages of knowing what you want to accomplish before going to the meeting?

---

4. What would be the advantages of using Features, Advantages, and Benefits to share information about Brookdale?

---

5. Where do you access the collateral to bring with you on a visit?

What criteria would you use to select the collateral to bring?

---

6. Judge the value for you of Good, Better, and Best outcomes for each visit.

ACTIVITY 4: Planning a Visit

DIRECTIONS: Choose one possible referral identified on the Live, Work, Play Worksheet. Create a plan to visit them using the Professional Visit Experience Planning Tool. Take a picture of your plan and send it to your DDS for review. Set a time with your DDS to review the plan and role play the conversation before you conduct the visit.

ACTIVITY 5: Conduct a Professional Visit

DIRECTIONS: Execute the plan you developed to visit a professional referral.

ACTIVITY 6: Evaluate Your Visit and Plan Next Steps

DIRECTIONS: Reflect on the outcomes of your visit and develop plausible next steps. Review your next steps with your DDS and get feedback on your strategy. Be ready to explain why you will take the steps you suggest. What will they accomplish?

Medical and Non-Medical Outreach Part 2

Our Outlook on Outreach

Brookdale Sales Associates identify and manage several professional relationships within a five- to seven-mile radius of your community. These Professional Relationships include:

- **Physicians and healthcare professionals**
- **Clergy members**
- **Insurance Agents**
- **Lawyers/Legal Advisors**
- **Financial Planners**
- **Nonprofits**
- **Real Estate Agents**

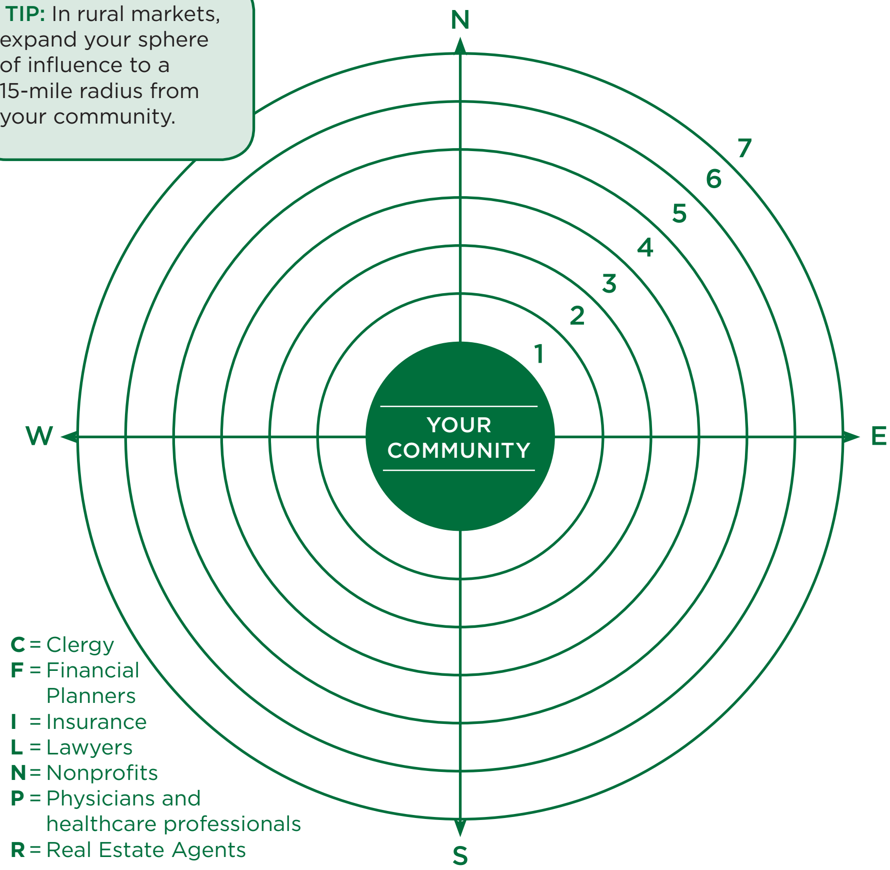
Read the Community Outreach Standards in your Sales Associate Playbook.

Activity 1: Won't You Be My Referral?

DIRECTIONS:

1. Perform a Google search and use your existing resources to map your current relationships within 5–7 miles of your community.
2. Ask your DDS to use the Asset Index for a list of all the professionals in a 10-mile radius of your community.
3. Use this key and map below to plot the data from Steps 1 and 2, or create an online map using Google maps.

TIP: In rural markets, expand your sphere of influence to a 15-mile radius from your community.



Analyze your existing relationships using these questions:

What types of relationships do I currently have? What is their referral potential? What types of relationships do I need to develop?

How are my referral sources distributed across my sphere of influence? Where are opportunities for growth?

Do I have an even mix of Bronze, Silver, and Gold referral sources? Among these sources, where am I spending my time? Where do I need to invest more time to nurture the relationships?

ACTIVITY 2: New Route, New Opportunities

DIRECTIONS: Take a different route from your home to your community at least two times this week. As you drive, take note of the medical buildings, churches, and other offices on your route.

When you arrive at your community, review your current list of referral sources and verify if any of the places or people you noticed while driving is on it. If they're not on the list, brainstorm first steps to build a relationship with the new prospects.

New Opportunities

1. ______________________________

First Step: ______________________________

2. ______________________________

First Step: ______________________________

3. ______________________________

First Step: ______________________________

4. ______________________________

First Step: ______________________________

5. ______________________________

First Step: ______________________________

ACTIVITY 3: Determine Next Steps

DIRECTIONS: Read the scenarios and develop next steps for each referral source.

1. Marley Medical Associates has referred eight patients to your community in the last year. There are three physicians in the geriatric practice. You work most often with Dr. Garcia and have never met the other two doctors. Dr. Garcia appreciates your bi-weekly drop-in updates on his patients and on available occupancy.

What next steps would you take to grow your professional relationship with Dr. Garcia and Marley Medical Group?

Explain the rationale for your actions and the timeframe for them.

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2. Father Frank is the Pastor of All Saints Episcopal Church located two miles from your church. All Saints is the second largest church in your community with over 500 members. You met Father Frank Flannigan while he was visiting Sally Smith, one of your residents. Frank has shared with you that the average age in his congregation is 73.

What next steps would you take to grow your professional relationship with Father Flannigan?

Explain the rationale for your actions and the timeframe for them.

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3. You work out at the local YMCA and notice there are several exercise classes and programs for seniors. After the classes and programs, several seniors gather for lunch at the snack bar and chat. Patty, the Senior Program manager always roams from group to group to check on her favorite YMCA members. You have a quick conversation with Patty and discover she has over 350 seasoned seniors who participate weekly in her programs.

What next steps would you take to grow your professional relationship with Patty?

Explain the rationale for your actions and the timeframe for them.

---

4. Patrick E. Anderson and Associates is a law firm that specializes in family law and eldercare. Over the past year, you have given two formal presentations on the benefits of senior living for their clients. As a result of the presentation, you received 10 referrals that resulted in two move-ins.

What next steps would you take to grow your professional relationship with Anderson and Associates?

Explain the rationale for your actions and the timeframe for them.

ACTIVITY 4: Build Relationships

DIRECTIONS: Choose one Bronze, one Silver, and one Gold referral source, and use the PVPT to plan a visit with each one. One PVPT is provided below; for the other two, go to BigTinCan and download them.

BROOKDALE
— SENIOR LIVING SOLUTIONS —

Professional Visit Planning Tool

BASIC INFORMATION

Organization Name: ______________________ **Point of Contact & Title:** ______________________ **Company Contact Information** **Address:** ______________________ **Phone:** ______________________ **Email:** ______________________	**Referral Tier (Select one):** NEW ○ GOLD ○ SILVER ○ BRONZE ○ **Priority Targeted Organization?:** ☐ Yes ☐ No **Date of Visit:** ______________________

MEETING PREPARATION

Current Resident Relationships	
Past Resident Relationships	
Background Information (Do your research!)	

MEETING STRATEGY

Meeting Objectives	*(What is the stated purpose of the meeting? Is the value to the professional clearly defined and communicated?)*
Who's going with you?	*(List out any A-team members that are going with you and what their role will be during the meeting.)*
Information to Gain	*(What is needed to help you identify win/win scenarios between you and this contact?)*
Insights to Share	*(What updates or information do you plan on sharing with/knowledge of Brookdale?)*
Collateral	*(What tangible items are you taking with you that could be a source of value to the professional?)*
Meeting Outcome	Good – Better – Best –

ACTIVITY 5: Preview Your PVPTs

DIRECTIONS: After completing the PVPTs in Activity 4, schedule a phone call with your DDS to review your plans for each referral source.

Revise your plans based on their feedback and execute them.

ACTIVITY 6: What Happened?

DIRECTIONS: Review with your DDS the results of the outreach actions you took with each referral source. Discuss:

- What did you expect to happen?
- What actually happened?
- What will you do differently next time? Why?

ACTIVITY 7: I Own My Neighborhood

DIRECTIONS: Use *wordle.net* to make a word collage that illustrates what "owning your 'hood" means to you.

Take a photo of your creation and post it to the Brookdale Sales Facebook page, and send it to your DDS.

"Planning = success! Always have a plan but also know that plan will never play out as you want it to. Things have a way of working themselves out when you are doing the right thing, with the right heart, for the right reason."

—Sales Counselor, Brookdale Alexandria

Own Your Market

Network for Sales Success

Networking and referrals go hand in hand.

Building relationships with civic groups in your community is a key part of your outreach strategy and sales pipeline development. Once you get to know the people in these groups and they get to know you, you'll identify many opportunities for referrals.

ACTIVITY 1: Existing Connections

DIRECTIONS: Schedule a 30-minute meeting with your ED to identify the three most active civic groups or organizations in your market and their current leader or liaison.

Gain existing information on the status of their involvement or partnership with your community and develop a next step to grow your relationship with them. Make sure each next step is specific, measurable, achievable, relevant to your sales goals, and time-bound (SMART).

1. Name of Organization: ____________________

Contact: ____________________

Status: ____________________

Next Step: ____________________

2. Name of Organization: ____________________

Contact: ____________________

Status: ____________________

Next Step: ____________________

3. Name of Organization: ____________________

Contact: ____________________

Status: ____________________

Next Step: ____________________

If you do not have existing relationships with civic groups, plan concrete and time-bound actions to develop them.

ACTIVITY 2: Action Plans

DIRECTIONS: Create an implementation plan for each of the next steps you created in Activity 1: Existing Connections. Incorporate these plans into your weekly outreach efforts.

1.____

____

2. ____

____

3. ____

____

Leverage Existing Networks
Your current outreach strategy includes building relationships with...

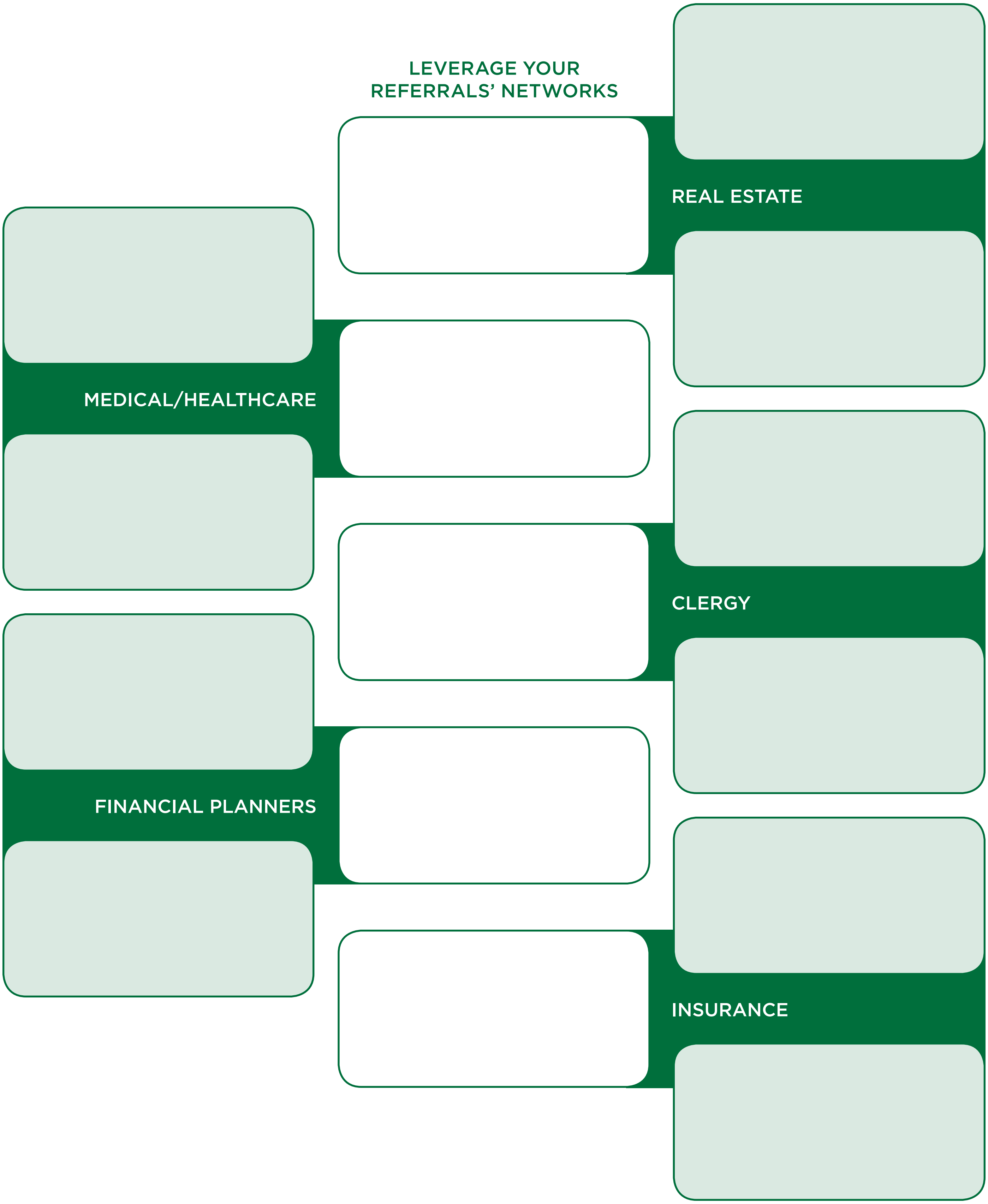
- Physicians and healthcare professionals
- Clergy members
- Insurance Agents
- Lawyers/Legal Advisors
- Financial Planners
- Nonprofit leaders
- Real Estate Agents

...who belong to larger networks unique to their professions. For example, realtors participate in the local Real Estate Association. Clergy people connect via denominational gatherings or community zones.

Expand your network by leveraging your current community partners' networks.

ACTIVITY 3: The Big Picture

DIRECTIONS: Interview your existing referral sources and identify their professional networks. Use the graphic below to document your discoveries.



ACTIVITY 4: Strategic Networking

DIRECTIONS: Choose a meeting to attendof those hosted by one of the networks you identified in Activity 3: The Big Picture. Before you attend the meeting, determine what you want to achieve as you network.

Make a Strong, Memorable First Impression

STEP 1

SET F.I.R.S.T. OBJECTIVES

F: Follow-up appointment. Set a date to meet a new referral one-on-one.

I: Introduction to another key player in your community.

R: Referral.

S: Speaking engagement in the community or in-service schedule in their office. Set the date.

T: Tour of the community. Set the date.

STEP 2

PREPARE

Ask organizers to share the list of attendees and do your research. Think of people you want to meet and what you want to ask them.

Develop a 1-minute pitch about yourself for someone who asks you a question.

STEP 3

NETWORK

Ask questions. Listen. Engage in conversations. Don't oversell. Remember your objectives.

STEP 4

FOLLOW UP AND CONNECT

Review your objectives and identify next steps.

MY PITCH:

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QUESTIONS I'LL ASK:

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____

____

____

NEXT STEPS:

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ACTIVITY 5: Share Your Plans

DIRECTIONS: Set a 15-minute meeting with your DDS to do the following:

1. Review your plans for the networking event you'll attend.
2. Adjust your plan based on their recommendations.
3. Listen to one of their networking success stories for inspiration and insights.

TIP: After making personal connections with people in these groups, suggest your community as a meeting space, or lead a relevant presentation during one of their meetings.

ACTIVITY 6: What's Next?

DIRECTIONS: Evaluate the networking opportunity you attended.

- What went well?
- What could have been better?
- How will you build on the connections you made at the event?

Notes

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