

Debbie Howard ([00:00:14](#)):

Good day everyone and welcome to our smart webinar series. This presentation we'll answer your questions about lead generation and nurturing strategies and the presentation will be between 45 and 60 minutes followed by Q and A.

Debbie Howard ([00:00:29](#)):

Before we get started, I'd like to go over a few items so you know how to participate in today's events. You'll have the opportunities to submit text questions to today's presenters by typing your questions into the question's pane of your control panel. You may send in your questions at any time during the presentation. We will collect these and address them during the Q and A session at the end.

Debbie Howard ([00:00:52](#)):

And I'd like to welcome our speakers, Dan Hutson, Senior Living marketing consultant and speaker. We have Julie Podewitz, chief sales officer at Vitality Living. Amanda Arnouk marketing and branding manager at Vitality Living and me, Debbie Howard, CEO of Senior Living Smart. I'll be joining today as well. This session is going to be a deep dive into how well Vitality Living is, creating new strategies and putting new tactics into place to continue to build their brand and their sales pipeline and also to nurture prospects in this new reality that we're all living in. Thanks to the speakers for joining us. We're happy to have everybody on board just to share best practices. And today's session is really trying to get specific into the tactics so that you walk away with actionable things that you can put into place. And if you need help, you know who you can call on to help. So Dan, I will turn it over to you.

Dan Hutson ([00:01:56](#)):

Great. Thanks Debbie. So first let's just take a quick look at our agenda today. We're going to be talking about five things. We're going to talk about rebuilding the brand, reframing your positioning, talk a little bit about your sales approach, talk about experimentation, and then positioning for the future.

Dan Hutson ([00:02:22](#)):

Let's start with rebuilding the brand. Or it actually might be more accurate. After we built this presentation, I thought probably the more accurate thing to say would be to retool or rethink your brand. I'm sure you know your brand is probably in pretty good shape, but we've all complained over the years about this perception that people have that we're the old folks home. We're a retirement community and it has a lot of negative associations. This is really, this is a time, a chance for you to really rethink or reposition your community as a true community resource. A resource that supports older adults in living rich, purposeful lives in a healthy, safe environment.

Dan Hutson ([00:03:11](#)):

We really, as an industry, we should be on the front lines of safeguarding lives for older adults. That's the perception we should be building out there, not what we're seeing in the media. That we are breeding grounds for Coronavirus or we are the places that are most vulnerable. The first major news stories out there, up in Kirkland were set in a nursing home. Just two days ago there was a story in the LA Times about a Silverado community memory care that had moved a new resident in and they immediately had a small outbreak of Coronavirus. What can we do to shape more positive perceptions of our brands? There's an opportunity here for us to really rewrite the narrative of who you are and you can do this by sharing your expertise and your knowledge.

Dan Hutson ([00:04:07](#)):

You as a community, you're a subject matter expert, right? You can be a trustworthy, healthy, helpful advisor in very difficult times. And how you do this is become a hub for helpful, trustworthy advice. Too many websites, for example, we use your website as an example. I look at hundreds of senior living community websites out there and so many are still just marketing brochures. If you add how-to content, news you can use either create your own helpful, trustworthy content or curate, the great content that's already out there, point people in the right direction and save them time. You can begin to position yourself as not just a place that's trying to sell housing, but you are a true community resource around successful aging. And now's a good time to redirect some dollars that you're maybe not otherwise using toward content marketing and other ways to reposition yourself.

Dan Hutson ([00:05:15](#)):

You can use it to build downloadable content, develop your own webinars. You can do webinars for both the public and for other senior serving professionals because they have a great need for helpful information. You can even offer your subject matter experts to local media. Why wait for local media to come to you and ask about this latest outbreak in a retirement community when you can be providing trusted advisors who can talk about how to maintain safety and health while continuing to live a purposeful life. Be that resource to the community. I want to kick get over to Julie now and let her talk a little bit about what Vitality is doing in this area. Julie.

Julie Podewitz ([00:06:04](#)):

Thanks Dan. Well, welcome everybody. Pleased to be on and just share some of the things we're doing. We've certainly uncharted territory for all of us and we don't pretend to know everything about this at all. We're learning as we're going just like you are, but really looking at Covid. No one saw this coming. But taking a look at what as a company what Vitality Living could do as far as to be a resource. So many of us come into this business, come into sales because we want to be helpful because we want to be a resource and I hear that over and over and over again and really take it to heart and put it into practice of how we can do that. And Vitality Living started this dialogue mid February which seemed early to be really focusing in on what are we going to do, what's the messaging, what is the plan? What do we want others to know about what it is that we're doing as far as protocols and we were all in the dark. So we're learning and getting this updated daily.

Julie Podewitz ([00:07:20](#)):

And so with Vitality, we wanted to take our current brand or mission, which is to create vibrant communities where our residents thrive, our families engage and our team members are proud to work. And continue that message with the messaging or the content as it relates to Covid and how we are all on edge and we are all eager for the latest information updates. One of the things that we put into place is Facebook Live messaging and we started with our CEO Chris Guay to go on Facebook Live and just talk through and what we're doing, what the protocols are, what we know, what we don't know. Being as transparent as we can possibly can, which is in some cases saying we don't know, but this is what we do know and this is what we're putting in place.

Julie Podewitz ([00:08:17](#)):

We've had our VP of wellness on Facebook Live. We've just recently had our VP of engagement on Facebook Live and we have seen tremendous engagement here. Chris has had over 5,000 engagements on his. And our wellness over 2,500 and it's incredible, incredible how much engagement that we've had

with Facebook Live is something as simple, right? It's Facebook Live we weren't doing it and we weren't doing it regularly. The other piece is to have our EDs, our executive directors are doing a Facebook Live update every day. 10:00 AM every day and we'll share some specifics on that as we move forward. But in our mission to have families engage, we have seen a 500% increase in our engagement our social engagements this month. 500% and Vitality, this is in region two it's 10 communities. Our reach is over 32,000 in this month alone. Blows me away actually how much engagement we've had from both a local level.

Julie Podewitz ([00:09:31](#)):

It's really all to the local level because Chris' goes on home page or vitality page, but it goes on all community pages for region two and that is Tennessee, Texas, and Alabama.

Julie Podewitz ([00:09:46](#)):

We'll talk a little more about that but moving forward, something else that we did and, and Amanda will share with you, we put together a Covid specific page on our website and when you go on, our homepage is a pop up right away cause again that's what's on everyone's mind, right? And we can click on it and go right to our Covid communication and response page. This is updated regularly and include the latest in a corporate, Facebook recordings. That's Chris, Renee, and Rachel. It outlines our strategy, of what we're doing, what we have been doing and say the date that it's been updated and we do have critical updates that we're going to add today for our new move ins. We are testing, we are testing all new move-ins, which is something that's not required. But again, we want to be ahead of any of state and federal requirements. We also have a link to the message from Chris, our CEO and we've added additional resources which would be linked to X journal experts like the CDC.

Julie Podewitz ([00:11:09](#)):

And then anytime if we're in the news or linked to again, other senior living hosts. We've had a lot of questions, a lot of engagement as I mentioned. So we've added frequently asked questions to this page with simple answers again that we update. Amanda looks at this every day as does our leadership. Our leadership team has been meeting daily. We have a daily Covid conference. We are working from home right now. We're sheltering in place and probably see my. This is my house, but we get on every day at 10:30 and we strategize. We also have a link our community pages because again it's what we want to know is what's happening in our local community, right? And then we all jump on national news. It's in our face, but we really want to know what to know what's going on in our own hometown.

Debbie Howard ([00:12:07](#)):

So Julie, you had mentioned about the engagement like your total month engagement is like 3,200 are you talking specifically about just through this Facebook channel, through the Facebook live events and then the recordings, just this one channel has produced this level of engagement?

Julie Podewitz ([00:12:27](#)):

It's 32,000 and it has over just Facebook engagement. That would be views, posts, likes, follows just Facebook. We have recently added that information page as Amanda showed you about three weeks ago. So we have a tremendous increase in engagement as far as downloads on or clicks onto that link. We don't have a lot of statistics yet for that.

Debbie Howard ([00:12:57](#)):

Okay, that's great. And are you finding that people are more interested in those local updates from the executive directors? What's the balance of kind of the corporate messaging, if you will, kind of the more brand centric or the really what's happening in my community.

Julie Podewitz ([00:13:16](#)):

Yes, I would say that people do follow Chris and he's a really likable guy. He's a knowledgeable guy. A lot of people know him, so his posts get, his feed gets a ton of followers, but it really is the local. For example, one of our newest communities is a standalone memory care, The Gardens of Germantown close to Memphis, Tennessee and their executive director was really nervous. I mean she will admit she was crying. She did not want to do this live Facebook feed as she was that nervous and they went from an average of 199 engagements a month, to over this month, 3,000 in that one community. And here's are the cutest, sweetest posts and now she loves it. She loves it.

Debbie Howard ([00:14:07](#)):

And isn't she the one who featured a resident, a memory care resident on the Facebook live event?

Julie Podewitz ([00:14:14](#)):

She had her memory care resident do the update. Isn't that great?

Debbie Howard ([00:14:18](#)):

It is. Cause I think so many of the images that we're seeing are not positive, right? So everything that the media is showing us is pretty negative at this point and concerning. Just to see a more normalized, a resident just speaking about their day and what they're looking forward to. I think those are the channels that we can impact. And Amanda, from a technical side standpoint, I know we had a lot of questions, we asked questions when people registered for this webinar, what you like to know more about? And we had quite a few that wanted to know how difficult is it to set up Facebook Live? Do you have to have a Facebook account for each community or is this something you can do from corporate? So I know Amanda, you set up the Facebook Live events on behalf of all of your communities and I don't want to take a lot of time on it, but maybe you can just maybe give people a highlight of what that was like.

Amanda Arnouk ([00:15:19](#)):

Yeah, absolutely. The first thing I did was you have to get all of your executive directors access to the Facebook pages. And so editorial access is all they would need. And then you, I created just a quick word document of how to send them out a how to post. And really you just go to the communities page, you click live and then you just click start now. It's pretty simple. The hardest thing is sometimes it wants you to use a stream key, which is a little bit more technical than most people want to deal with. You just need to change stream key to camera and you're ready to go. Pretty simple and the executive directors have proven anyone can do it and they're doing it daily on their own now I don't have to help them.

Debbie Howard ([00:16:08](#)):

That's great. Just think of the behaviors that you're creating for after all this is over the comfort level and the growth of the executive directors using these channels. They don't sometimes like to manage sales isn't their favorite thing, but this is managing sales but in a different way. And Julie, do you have a script or talking points or do you give the EDs any guidance or how do you handle that?

Julie Podewitz ([00:16:35](#)):

We don't have a script. We, the guidance is start with positives. As we were reviewing it we had some that were saying, well we've got this many cases in the state. I understand that people are nervous about Covid, but always do the positives and talking about what's going on in the community.

Julie Podewitz ([00:16:55](#)):

That's what our followers want to know. And it's interesting because it's 10:00. Each morning and if an executive director doesn't get on right at 10:00 maybe there's something going on. We all know that the whirlwinds that our day can turn into, we'll start getting messages like we're looking for you, we're looking for you. And so to your point, really setting up, I mean we've been, I don't want to say fortunate, but we always have to look at what can we learn, what are we learning, right? And if this is Covid is forcing us to lean into way into discomfort, what can we learn from this and how can we grow and what can we do with our larger platform, which is really exciting. And taking something we should've been doing, we should have been doing live Facebook feeds and it took this for it to click with us. So this is something we will absolutely continue to do as new move forward.

Debbie Howard ([00:17:50](#)):

Awesome. Then in order to kind of let people know, I know that you obviously put on Facebook that you are having these live events daily and also through your regular e-blasts and newsletters and on the website. So there's lots of ways of letting people know and I know on your website in the Covid section, they can actually just click on the community that's closest to them and it will take them directly to that Facebook where they can participate in the Facebook live at 10:00 every morning. Wonderful, we had a lot of questions on that so I just wanted to make sure we got into some level of detail on it. Thank you.

Julie Podewitz ([00:18:32](#)):

Dan, back to you.

Debbie Howard ([00:18:33](#)):

Oh, okay. Sorry. Nodded off with my eyes open. So I want to talk about reframing your positioning. In line with rethinking your brand. You can reframe it I think in two ways. One, show how your community adds value to the lives you serve. And then secondly, extend your support to the larger community. You want to be seen as an asset, not just an asset to the people you serve, but also to the community at large. First, let's.

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Dan ([00:19:03](#)):

...go to the community at large. First let's talk about adding value. We're really good as an industry, I think, at articulating features and benefits, but it almost always feels like a sales pitch. Try taking more of what I would call an explanatory journalism approach. Take people inside the inner workings of your community. We live it day to day so there's nothing mysterious about it but you have to remember most people don't experience senior living in the way we do. So it is something interesting and something different for them. Explain what you do, how you do it, and why you do it. Tell inside baseball stories. Inside baseball is a metaphor for the minutiae, the detailed inner workings of a system that usually are

only interesting to insiders and aficionados. Right now I think there are a lot of people who are interested in the inner workings of what you do.

Dan ([00:20:04](#)):

In our case, it's a way for you to show deep expertise in supporting older adults. One example would be instead of just saying you provide a safe environment, walk them through exactly the procedures and protocols that you put in place to ensure safety. Take them inside your operation. Take them under the hood of your operations. People love to understand how things work, so take advantage of that. You have really talented people working in your communities. Make them the stars of those stories, bring forward your dining room supervisor, your chef, the person who's running activities or your head of healthcare. Bring those people and make them the focus and let them talk about what it is that goes into delivering the kinds of services that make up your community.

Dan ([00:21:05](#)):

Second, I want you to think about showing your support for the greater community. This is a great way to position your community as an asset. It could be financial support by buying locally. It could be finding new ways of extending your services to older adults not living in your community. It's interesting the number of restaurants... My wife and I walk every morning. Of course, we're always six feet apart from everyone else, not us but... And we've gone by some of the restaurants that we typically go to and we will find that they're now selling supplies that they can't use in their normal operations.

Dan ([00:21:46](#)):

You go to the little cafe and they're selling toilet paper and they're selling other things. Yes, it's because they want to continue to generate a revenue stream, but it also feels like they're participating in the life of the community and they're providing things that people are looking for. It creates a positive perception. So your work, you could be doing things as simple as... And Julie showed you an example on the Vitality page of curating information on local resources. Are there senior shopping hours? Are there pharmacy and restaurant delivery options? Or just basic links to community resources. In that way you can show how you contribute beyond your own walls. Julie?

Julie ([00:22:39](#)):

Great, thanks, Dan. We'll show you a few things that we're doing and we'd love to hear from you all as well because I'm sure there's a lot of creativity on this call. One of the things as far as reframing positioning that we're doing is that we're literally changing our messaging from on a digital side is also more conventional side which we'll show you. We're turning it over to virtual tours or virtual visit. We're putting that language in our digital marketing and then we're also, and we have been, but we're even tweaking it a little bit more now specific to COVID, is providing content piece other than the company brochure, although that is also available.

Julie ([00:23:32](#)):

Another thing that we're doing that I have absolutely love and Debbie and Amanda drove this. I love this. These are guides, as Dan mentioned, that are specific to their local community. So let's say Spring Hill, Tennessee. I hope you guys can see it. If you can't, jump on our website and download one of these. This speaks to not about traditions of Spring Hill, the senior living community, but it speaks to what is it like to live in Spring Hill, Tennessee? It gives landmarks. It gives specific names of local businesses, hangouts. Spring Hill is a lovely small town, hometown, safe, welcoming community. If you read through

it or just look through it that's the feeling that one gets and that's where we were going with that. Do you like outings? Do you like farm fresh? We have a farmers' market and local, which we do source in our senior living community. Local fitness. We have fitness classes in our community but you might want to do something outside of, right? Or maybe your friends and family want to know?

Julie ([00:24:54](#)):

We've had a lot of engagements with these guides. It was Debbie's idea and we started in the Texas to Texas properties and we've expanded it. And by the end of two, three we'll have one for every one of our communities in Region Two. So again, this is a guide to living in that particular area. For us in some of our areas, Nashville, greater Nashville is a massively growing area, as Spring Hill, Tennessee, for example. People who move and relocate, Spring Hill is the largest now GM plant and there's Nissan. A lot of people move here and relocate here and then they need to or want to bring their loved ones. We see a huge, huge influx. This type of guide is great because we have so many people coming into the town.

Julie ([00:25:54](#)):

And then Amanda will take a look at some other ways that we are reframing our positioning is of course the information page on the website and also we'll share with you in just a little bit something that we do, information and an email blast and Debbie will talk a little bit about that reach.

Julie ([00:26:17](#)):

Can't reinforce enough content on social media. Content in the form of more story telling. It's not telling what we are but more of who we are, through storytelling. Amanda put some imagery of... some stills on the Facebook feed and you can tell it's true. The picture `tells the story. It's a literal story. You don't have to say we're caring, loving people or we have a safe environment. It's bringing a resident. We have a resident on these live Facebook feeds, team members, team leaders.

Julie ([00:27:01](#)):

You don't have to say, "Hey, we have a lot of fun." A resident comes on with a... A wellness director did one of these in a chicken suit and then he got up and did a chicken band. He didn't need to say, "Hey, along with helping keep our residents well we have a lot of fun." He's doing the whole thing in a chicken suit. So I'm guessing that relays that we try to have a good time here. So I would encourage that. You don't have to be perfect. You don't have to have a script. Just get on, be yourself and the genuine you will come out. Ask a family member to do a short message. We asked for testimonials. We've had some great feedback and engagement from our family members. Have, again, a resident, maybe the chef comes on talks a little bit about dining and social distancing and what some of the creative things that are happening in the world of dining because that's something that people really want to know.

Julie ([00:28:06](#)):

One thing, too, that we've done for a while at Vitality, but we're again moving our messaging even more towards COVID specific, is content marketing. We have done, and Debbie, I'd like you to, if you wouldn't mind, talk a little bit about what you all have helped us with as far as, I think we're what, three into our fourth year of doing content marketing. Debbie can talk through this a little bit.

Debbie ([00:28:36](#)):

Yeah. We basically have an inbound content strategy that we marry with marketing automation and we've been doing it with Vitality for three or four years. There's a new blog every week. It's all keyword enriched. It's usually linked to a campaign. If you notice the ones up here we're seeing now are all about blue zones and healthy aging because we've come out with a 20 page guide on the five parts of the world that have the healthiest longevity, people who are not only living the longest but living the best lives the longest. What can we learn from them? We'd come out with a guide, and in that guide we would have 12 relevant topics. Every week there's a different blog that's tied to that.

Debbie ([00:29:26](#)):

The call to action is to download the guide. Those are gated and that's how we get a lot of contact information. Over the course of the last three or four years through marketing automation and the content strategy, we've been able to get 6,200 prospects and contacts that we're nurturing on behalf of Vitality.

Debbie ([00:29:49](#)):

Right now we're working on the whole COVID, unfortunately. It's not a topic any of us wanted to have to cover, but we are working on a guide specifically for seniors. We have a series of blogs to go along with that. The blogs create the keywords that people are searching for. They're searching for COVID and seniors or keeping seniors safe, or safe grocery shopping. There are things that people are really concerned about. As you look at how people are searching for those senior topics, which you can do by going to Google and typing in some of those concerns, then you get to the bottom and it says people also are searching for and it actually tells you the keywords that people are searching for around that same topic. That can inform you about what you should be writing about.

Debbie ([00:30:40](#)):

We should be providing information and resources that are in alignment with what's top of mind and most relevant to our prospects and to our local community because we want to position ourselves as thought leaders and wonderful resources. You'll start seeing those blogs show up here. But Vitality typically gets about 1500 visits per month just to read the blogs. So if you're not blogging, good time to start. I would highly, highly recommend it.

Dan ([00:31:15](#)):

And the great thing about building the kind of content inventory that Vitality has done on their website is, this is marketing that operates 24-7. It's not a campaign, it's not a digital ad. It's not something that generates a spike in activity and then the campaign's over and it goes away. This is a marketing resource that works for you day in and day out. You need to be focused more on activities that you can literally turn on, monitor, occasionally tweak, but that are a continuing source of lead [inaudible 00:32:01] and content marketing. That's one of the greatest strengths of building this kind of content resource.

Debbie ([00:32:07](#)):

Absolutely.

Julie ([00:32:10](#)):

And one last example for those of you who may have contracts, print contracts. We don't do a lot of print advertising, but we do have two communities in particular in very small town areas, small



community, intimate, and they have papers, local papers that are widely read. We have ROI, very good ROI in these two in particular. One is Athens, Alabama in northern Alabama. This is an example of the switch or us reframing positioning in local print. It talks about our commitments to helping keep our families or residents, team members safe or limiting exposure. The call to action is to join us on the executive director Facebook Live and it gives a link on how to do that. We can also call for a virtual tour. You can see we changed the verbiage there to virtual. We want to, again, position ourselves as through the mission, really put forth even in print ads. Our mission is creating vibrancy and really engaging our family. We're all really proud to work. Keep that in mind in all of our marketing.

Debbie ([00:33:43](#)):

That's a great example because you're reinforcing your mission and you have two calls to action to schedule a virtual tour. You can actually walk somebody through using video and still give people an inside look at the community as well as the second call to action to join to the Facebook Live. I would assume that this is a trackable number so that you know exactly your ROI on this campaign. I think that's a great example.

Debbie ([00:34:12](#)):

And then Dan, to your point about... I love the inside baseball. We don't think what happens behind the scenes is particularly interesting, but right now people are thinking, "I have an 86 year old mom, Andrea has a 90 year old mom." And what you're thinking about is, what's the supply chain like and is it safe to go out? What happens if they run out of things and who's going to take them? To be able to do something like, to take people behind the scenes and bring him into the kitchen and show an abundance of food and supplies, it's not a direct sales message, but it certainly is comfort in terms of they're okay, they have supplies, they have folks that are cleaning, they have all of this infrastructure built in.

Debbie ([00:35:01](#)):

You can accomplish that, Julie. I don't know whether you've done it all. I know you've recently engaged with Heart Legacy around video, but to take that Heart Legacy video or even maybe something as simple as your phone camera and take it around and actually be able to show people some clips, interviewing some staff members or coming in while the food's being prepared or behind the scenes. Look, we have toilet paper. I don't know why that's become a thing, but it has. I know that you're using video for virtual tours, which is wonderful, and sales mail, which we'll get to in a minute. Any plans around using that technology more for those other behind-the-scenes type messages?

Julie ([00:35:48](#)):

Oh, I love that. I love that. Yes. There's plans to do it and they're doing it now, so through the Facebook Live feeds, certainly we can do them from a sales and marketing perspective either through sales mail or, like you said, use your smartphone. I love the message about toilet paper. It is a thing, right? If you've gone to 13 stores and not been able to find any, it's maybe top of mind. We can get messaging across in a storytelling kind of way, which I love that behind the scenes or inside baseball as Dan would say. It's a great idea.

Debbie ([00:36:38](#)):

It's the only baseball we're going to get.

Julie ([00:36:42](#)):

I know.

Dan ([00:36:42](#)):

And you think about it, I read a lot of stories in the various trade publications and I think this is a great story for the general public to better understand how we operate. In normal days, who cares about supply chain management? Right now everybody's really focused on their own personal supply chain management. If you can differentiate, if you can show the differences between institutional supply chain management and your personal household management around toilet paper, eggs, sanitizer, you've seen how many stories trying to explain why there are toilet paper shortages when there really isn't. There's been no reduction in production. It's been a supply chain issue. If you can tell the story of this is how we get our supplies and this is how we guarantee no service interruption or less impactful service interruption so that people can compare and contrast that to their own home situation, that's a really powerful selling point for your community. It's something that you would never put in a marketing brochure, "Hey, you'll never run out of..."

PART 2 OF 4 ENDS [00:38:04]

Dan ([00:38:03](#)):

Something that you would never put in a marketing brochure. Hey, you'll never run out of toilet paper in our community. That's not something you put in a marketing brochure. But right now, that's something that's top of mind for people. So there are some really interesting opportunities for creative storytelling around things that you never thought you would tell a story about.

Debbie ([00:38:25](#)):

So true. [crosstalk 00:38:25]

Dan ([00:38:25](#)):

So we're going to talk a little now about reframing your sales approach. And I don't know if this is going to rub some people the wrong way, because some of the questions that I've seen around, should we be moving people into the community, should we continue our selling activities, et cetera. You've been hearing for years from some of the top sales minds in our industry. I'm not one of them, but I respect sales professionals immensely. But what I've been hearing from them for years is stop selling, start helping. If you aren't already doing that, now is the perfect time for you to begin to make that shift.

Dan ([00:39:10](#)):

This is not business as usual, folks. And I have been on so many websites where... It's interesting. They don't even mention what's going on in terms of coronavirus. It's like they're operating in this bubble world where everything is fine. And they don't even acknowledge the impact that this is having on their business. And I just think that that's a wrongheaded approach. Communication today over communication is more important than your marketing. Okay? Focus your sales activity on showing genuine empathy, genuine concern. Work on your relationship building. Offer your assistance. Now is not the time to be focused on, "How am I going to move this prospect to the next sales stage?"

Dan ([00:39:59](#)):

If you build stronger relationships by making a real connection, being human, demonstrating genuine empathy and concern, you will move people closer to a purchase decision. Just call prospects. See how they're doing. Figure out what they might need. Offer the right support or assistance. That's going to go a long way toward deepening the relationship you have with them. And you will find that after this is over, they're going to see you in a different light. You will have created a much stronger and enduring bond, a better relationship with those prospects than you ever could have when they just saw you as someone who's trying to sell a product. So step down off my soapbox. [inaudible 00:40:49]

Julie ([00:40:51](#)):

[inaudible 00:40:51] My favorite, favorite, favorite topic. And I want to be cognizant of time to give time for questions and don't want to rush through this. But this is again, a tremendous opportunity, just to piggyback on what Dan is saying, to work, as I would say, on your business. Work on it. So often, we're just in the weeds, we're working in the business and go, go, go. And now's the time, especially, to pull out of the weeds and look on the business. I saw something recently. It was about, I used to say I didn't clean my house because I didn't have enough time. And now I wonder what my excuse is. Right?

Julie ([00:41:33](#)):

So, now we have time. We have time to clean up the database, right? We have time to work on what I call the foundational pieces of our business. So practice your skill sets and practice in real life. So take time to plan the call, and think about, as Dan was saying, now we really can't fall back on come in for a tour. And we... So what is the call about, right? What is the objective about? And what questions do we want to ask? How do we want to open the call? What would we like the person to talk about? And without that maybe pressure... And I know sales is always pressure. And if you don't like pressure, you shouldn't be in sales. But it's at... Without that sort of, oh, I can't really go over there. What do I do? Don't do anything. Just ask them questions. Engage.

Julie ([00:42:33](#)):

What we're finding at Vitality because we're very metrics-driven as well. So it's, like, what are we measuring here? We're noticing two things. One is our follow-up calls are longer. So that makes it... kind of reinforces that. Wow. Okay. They're... It's not just, Hey, I was calling to check in to see if you're ready yet. It's calls that are what we should be doing... and no, that we need to be doing... which is talking, listening, more importantly. This is a great time also to do creative follow-ups or personal touches, learning about our prospects, being able to follow up with them in a meaningful way.

Julie ([00:43:20](#)):

It's a great time to plan, plan, plan, plan. We might not be able to have Spring events. Maybe in December, but let's take advantage of this time to create really, really, powerful events for the fall. And what I'll always say to myself and anyone that I work with is you succeed because you'll do things others won't do or don't do. And I think all of us, well three of us on this call, we're in this business [inaudible 00:44:01] during the great recession. And I think, will... And I'm sure many of you on this call, right? And what I saw first-hand, through experience, was the communities, the teams that dug deep, and did what others wouldn't do or there's lots of recession, no one's moving, or everybody is... I may as well just close up shop. Even mentally doing that, making that decision. Well, no one's going to do anything. It's [inaudible 00:44:27] and we're just going to sit around.

Julie ([00:44:28](#)):

If you're of the mindset of I'm going to do what others won't do and don't do. This is a time where A, you can have as many if not more move-ins or B, really strengthen your pipeline, and create what I call a bottleneck. So when the doors swing open. If we've done what we need to be doing, and we're really strengthening the pipeline, you're bottlenecking, so the door opens, and you're going to get record number of move-ins. When people feel, or when you feel that we're good to go. We are still doing move-ins. We still sell. We still move in. And we can certainly talk more about that, or if you had questions for me on [inaudible 00:45:13] how we are doing that, [inaudible 00:45:15] be more than happy to talk through that. Another thing too... I think it's on the next slide Amanda.

Julie ([00:45:22](#)):

As far as the sale teams go and sales approach, is to, like I... we mentioned before, is to go digital and rely on... You're face-to-face [inaudible 00:45:40] digital effort. So your digital meetings, digital phone calls even, I'm hoping that this really encourages... This meaning the times where we're doing more and more and more of the face-to-face kind of virtual phone calls, that are regular follow up, that much of it relies on face-to-face. It goes from voice-to-voice to face-to-face.

Debbie ([00:46:07](#)):

[inaudible 00:46:07] kind of lost your video [inaudible 00:46:09] Julie, so I hope we'll get it back.

Julie ([00:46:12](#)):

Oh. Okay.

Debbie ([00:46:13](#)):

I did want to just... have a couple of follow-ups. One is how is this affecting... Sure, other people are finding their overall lead volume affected. What are you seeing in terms of lead volume? But then also, how has the extra time that you're spending, really nurturing the leads that you are getting and spending more time as you were just referencing, how has that impacted your conversions?

Julie ([00:46:41](#)):

That's a great question. Our lead volume's been cut in half.

Debbie ([00:46:44](#)):

Okay.

Julie ([00:46:47](#)):

But our conversions are stronger. Our conversions have increased tremendously. Both that lead to prospect, as I call it, to tour, virtual tour, and then virtual tour to sale, has increased in March. Leads are about half though.

Debbie ([00:47:11](#)):

Okay. And so you're still selling. You're still closing. You're just doing it virtually. So are you doing it offsite? Are you finding you're able to even close sales just through video? Or do you find that there still has to be some kind of face-to-face interaction? It just is not happening within the community. How were you handling that?

Julie ([00:47:38](#)):

It changes. It changes almost daily. At first, we were doing parking lot closing, believe this or not. But now, we don't allow tours. We don't allow guests in. So it's then virtual tours too to closing that way. What we're finding, and you all might be finding the same thing, is that it's to kind of buckets of prospects right now. We have these really urgent... Those who are looking are either really urgent because they're looking in spite of their fear, and those who are way over on this side, or who I feel like, ooh, okay, now they're not going to try to pressure me because I can't visit.

Julie ([00:48:22](#)):

So those really early stages and then those urgent, urgent, I need it now. So we're seeing both. And we really want to take... and be able to help both. Right? So take advantage of those early, early stages by the nurturing. Either your marketing automation, your relationship development, your content pieces, and then your urgent, urgent what? What do we... Last week was four virtual tours closed... [inaudible 00:48:50] virtual. We do credit cards in some cases and some it's a cheque that's given in the parking lot it. Is it crazy? I know.

Debbie ([00:48:58](#)):

But just think that when we start building those behaviors where we can close sales virtually when things open up, how much better are we going to be? I mean this skill set that we're developing today can make a long-term impact I think for everyone. And then the move-in process is... Are you quarantining? Or are you testing and [inaudible 00:49:25] with your own staff? [inaudible 00:49:27]

Julie ([00:49:27](#)):

Yeah. We've got a move-in protocol. We've got protocols for everything and are... We have just enhanced the move-in protocol. But yes, it includes [inaudible 00:49:36] quarantine the new resident, and it also now includes testing. We have the ability... We have access to testing, Covid testing. It takes a doctor order, but with new move-ins, we can get a doctor order no problem. [inaudible 00:49:51] This answers the question of how do you ensure that... Why are you still moving people in? We've got that question from the very beginning. And a quick response is, look, people need help. We are... Us, all of you all on the call, Senior Living...

Julie ([00:50:10](#)):

You've got to think about it. We're following all the protocols. We are probably one of the best choices, right? And so, we have to, just as your mom may need our assistance, so does someone else's mother. But we're always looking at what can we do to ensure the wellbeing, right? So we do have... It's all in writing, our move-in protocol. It's discussed [inaudible 00:50:36] right during the sales process. And we're all, like I said, we're learning as we're going. And we're updating it almost daily.

Debbie ([00:50:36](#)):

Okay. It's kind of an interesting point you bring up about the increased engagement with earlier stage leads. It's almost like people feel safer right now. Like you can have [crosstalk 00:50:57] conversations, right? Because they're like, well, they're not going to try to sell me. They're not going to try to get me to come to another stupid event, an open house, all these things I don't want to do. They just want to call. I think if we're focused on how are you, and what are you doing today, and how long has it been since

you've seen your family, and do you have enough of everything that you need, and do you know about the shopping hours, and are you aware of all the services that are still up and running?

Debbie ([00:51:26](#)):

And I think the other important thing is that a lot of the other options are kind of falling apart, right? So I'm sure adult day centers are probably closed. You probably come home care agencies which may be less stable because of childcare issues or their own health issues or whatever. And so when you think about the options, on the one hand for people who do have an immediate need, it's probably best equipped, a Senior Living's best equipped.

Debbie ([00:51:56](#)):

And then for people who are early stage and just want to have a conversation without a sales pitch, they've probably never felt safer than they do right now. So get those salespeople getting on those phones and just reaching out and being human and calling people and checking on them and letting them know you're thinking of them. So we got a lot of questions coming in about sales and how you're moving people in and what your protocols are. So one question is are your salespeople in the community?

Julie ([00:52:29](#)):

Good question. They are. Yes. Except for one. We have one sales director who has a child in a high-risk category. So she's working from home. All of our team members are they have to do... You do the questionnaire before coming into the community... also have their temperature taken twice a day. And we are reinforcing, as I'm sure you all are, safety practices and our personal, and personal... I don't go... Social distancing and keeping away from others, as un-fun as that is. But it's always keeping our residents in mind, safety in mind. But yeah. For the most part, they are.

Debbie ([00:53:17](#)):

Okay.

Julie ([00:53:17](#)):

Great.

Debbie ([00:53:17](#)):

So we had a question about are you taking memory care? Because obviously, this is something that is going to be more difficult to understand and in a closer [inaudible 00:53:27] smaller neighborhood environment. And some people are beginning to not move in memory care. It's funny. It's kind of both ends of the spectrum. People seem to be... People we're talking to seem most comfortable with assisted living. The independent living folks just are misbehaving and the memory care folks [crosstalk 00:53:50]

Julie ([00:53:49](#)):

Yeah, exactly. Now, that's a great question. And look, I don't pretend to know everything. Believe me, I don't. We're navigating this just as... with everybody on this call. For our memory care, we are moving our memory care residents in... We're not moving as many. But now that we have our hands-on tests, we feel even more comfortable because as you all know, social distancing, things like that, which we can do with our independent folks and our assisted folks. We don't... That's not something that in memory

care we're... is able to do. It's same with quarantine. So we are moving memory care. And we have two buildings that just opened. We just opened Traditions of Mill Creek, March 1st. I kid you not. I mean this is [inaudible 00:54:42] our flagship community out right in Brentwood, Tennessee, 130 units, and it opened the 1st of March. I know. And then we have one in Coconut Creek, Florida. So we're... It's navigating uncharted waters, for sure, but we've moved in and Mill Creek, we've moved 18 in this month. [crosstalk 00:55:03]

Debbie ([00:55:02](#)):

Wow.

Julie ([00:55:03](#)):

[crosstalk 00:55:06].

Debbie ([00:55:05](#)):

Okay. And is it a two-week quarantine? Is that what you're going with? So every new resident stays in their apartment for two weeks or...

Julie ([00:55:14](#)):

No. No. Five days. And they have to also... because that's... It has to be asymptomatic coming in and being tested and then five days. Yeah. At least for now.

Debbie ([00:55:28](#)):

Okay. Well, thanks for spending the time on the sales piece because it's just a ton of questions that are coming in. Others are addressing things we're getting to next, but good stuff. Thank you.

Dan ([00:55:41](#)):

Okay, so the last ... Oh, wait. Do you want to talk about your creative touches?

Julie ([00:55:46](#)):

No. No. [inaudible 00:55:47] I know we're really pressed for time.

Dan ([00:55:49](#)):

[crosstalk 00:55:50].

Julie ([00:55:49](#)):

That was an example. I think Debbie might send that out as just some creative ways to stay in touch and keep things personalized through the sales process.

Dan ([00:55:58](#)):

Okay. So I want to talk a little bit about experimentation. It's a cliché, but it's a cliché because it's true. Necessity really is the mother of invention. We're being forced to look at sales and marketing through fresh eyes. And now is the time to try new things that we may have previously been hesitant or too busy to try. For example, how might we replace or augment some of our traditional high touch tactics, like tours and marketing events, with other kinds of tech-supported and virtual tactics? I think sometimes

we may over-rely on the personal tour. This is a time to really put to the test... Are there other activities or other relationship-building tactics that we can be putting into place that are as powerful or even better performers than say the tour? And where can we leverage other technologies to enhance sales and marketing? And I've talked to a number of technology vendors who work in this space, and one of their biggest complaints, they don't necessarily [inaudible 00:57:04]

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Dan ([00:57:03](#)):

... and one of their biggest complaints, they don't necessarily share it with you, their client or prospective client, but I hear it from them all the time. And that is that we as an industry, we are so conservative and slow to move in the adoption of new technologies. And I know for some of us, it's a financial issue. For others it's culture. It's hard to institutionalize changes. But now is a great environment in which to experiment for. It really, it forces us to move more quickly in testing and adopting new approaches. This could come in the way of a new uses for social media. It could be greater adoption of virtual and video tours. It could be video chat and streaming. Greater adoption of marketing automation. Marketing automation is something that we're beginning to hear more and more about.

Dan ([00:58:00](#)):

But most of us don't really have a great grasp yet. And not just in this industry, but in all industries. Marketing automation is at the very earliest stages of development and adoption. So you are not alone if you don't fully grasp what artificial intelligence, machine learning, what these terms mean and how they can apply to marketing. We're all pretty much in the same boat here. We can all learn together.

Dan ([00:58:32](#)):

But you can use AI to deliver more personalized communication. You can begin to automate lower level sales and marketing activities, thereby freeing up your sales and marketing professionals to focus on higher level relationship building activities. You can integrate new interactive tools on your website. They're just ... there's a wealth of different types of tools and technologies that we should begin testing and adopting those that show great results. And so when better to do that than when you are so severely constrained in using your traditional approaches.

Debbie ([00:59:18](#)):

Great point.

Julie ([00:59:20](#)):

It is great point. This is a fun topic. And thanks for staying on with us talking about a great time to experiment. It's like it's a great time just part of working on our business. So we have to practice what we preach. I do as far as working on the business because we can all get right in the business and the blinders go on. So want to just start out and then really hand it over to Debbie and her team to talk a little bit more. But again, doing those virtual, things more virtually. I mean we have some kind of recorded video tours on our website. Some of our communities have them already. Debbie will talk a little bit more about them. And some don't or yet put them together.

Julie ([01:00:09](#)):



And they're great. They're just great ways for people to kind of get a feel of the community. What I really like though is more personalized face to face, a personalized virtual experience. And it can be in the form of like I said, a tour, just a conversation or maybe meeting a resident or talking to the chefs and really personalizing it. We've done marketing automation for a few years and we are playing around with it. We meet every week with Debbie and her team to look at ways to grow and enhance and improve. So Debbie, could you talk just a little bit, because you're the expert in marketing automation.

Debbie ([01:00:50](#)):

Yeah. I'll touch on a couple of these. One is on the virtual video tours. You can do it with a handheld app like Heart Legacy where you can actually kind of brand those experiences. And also if you have a photography, lifestyle and architectural photography, you can create a video tour out of the photography. Because right now obviously you can't have anyone come in and do a video tour for you. So it's good to know that if you have photography, a folder, they will turn that into a virtual experience. So we've been building those for a lot of our clients.

Debbie ([01:01:33](#)):

And then marketing automation. Yeah, I mean this is the time to really nurture and cultivate all of those leads that you have in the database. So marketing automation takes over all those rote and repetitive types of things and make sure that you're personalizing the journey down to each individual based on their behavior, what they're interested in, what pages they're visiting on the website, so that every person that comes to your website, and most of our interactions start with a digital interaction. Somewhere between 87 and 92% of your prospects will visit your website multiple times before they ever pick up the phone or come in for a visit.

Debbie ([01:02:17](#)):

And so I'm making sure that you have lots of opportunities for them to convert. I think if you go to the vitality website, you'll see that we've created ... it is like the stickiest website you've ever seen. People can chat, they can do a self-guided assessment, a survey, we use Roobrik. Right in the front there's a form and on that form, which is going to be top of the fold and super important with mobile, they're going to be able to say who they're looking on behalf of. That gives you their persona information and then how, how can we help?

Debbie ([01:02:53](#)):

And they can decide if they just want a brochure, if they want to schedule a virtual, if they want to speak with somebody. And based on that we can then take them down a very personal path. If we know they've been on the memory care page, we can start feeding them memory care. If they download a financial guide, they're going to get a very different nurturing to reassure them and give them information about all the aspects of how affordable senior living can be and how to do that.

Debbie ([01:03:23](#)):

So I think that's the place to start. You can't really do marketing automation if you don't have any way of gathering kind of those touch points. So if you can create all those touch points, give prospects lots of opportunities to choose how to engage with you. And then once they submit that form, once they opt in based on their comfort level and where they are in their journey, then marketing automation really takes over to nurture them, encourage them, build trust, give them more resources that are relevant to

what they've expressed interest in, and then move them into a sales qualified interaction of a phone call or a tour or a virtual tour.

Debbie ([01:04:03](#)):

So I'd really recommend, as you're experimenting with things. Great time to experiment with marketing automation, video tours, a live chat. People come to your website with a question. And it really humanizes that interaction. And you can't do it with a bot. A bot can answer a question, but they can't empathize. They can't really have that more human touch. So we use site staff for that because it's very empathetic. And there's huge engagement with chat. So yeah, those are some of the experimental things that we've seen a lot of success with.

Debbie ([01:04:44](#)):

Yeah. So interactive surveys, chats, marketing automation. And then we changed out ... we had to change out the ... or Amanda, I think you probably changed out the calls to action on the landing pages. Whereas I think we did get really comfortable with schedule a tour, come to an event, schedule a tour, come to an event, come for lunch. Like all of those things became very rote and it was easy for us, wasn't necessarily the thing that the prospect wanted to do, but it gave us a reason to engage. And now those things have kind of been taken off of our plate. So instead of doing that, you can say, "I've really been thinking about you, I know that you're struggling to know is senior living right for you or is this the right time for senior living? And so, here's a link to our Roobrik survey. And you can find out for yourself if now is the right time for senior living."

Debbie ([01:05:34](#)):

So it's about being more creative and probably having more ways to engage than your typical lunch tour event. And I think that's where we have to get to. And after all of this goes by and we're back into being able to open our doors, we will have those standbys that we we're comfortable with. But in addition to that, we should have a whole stable of other things that we're comfortable with and that we have put into place.

Julie ([01:06:08](#)):

Yeah. One thing I wanted to show you, Amanda put this together, the email blast. And we sent it out. Like Debbie said, we have for 10 communities in region two, 6,200 people in our [inaudible 01:06:24] spot that we can send this to. And I liked this one in particular because it's a blend of that mission and then the COVID, which is what people want to hear about. This is Renee. So it's a live link to her Facebook. She's our VP of Wellness. It promotes that Chris will be doing another Facebook live. It does reinforce as of that date that we have no positive cases and we are a vital resource and we are accepting residents. And then this message to our loved ones. This is what got them by far, the most engagement was not the COVID update, but what our residents are doing. And it's a link to this.

Julie ([01:07:14](#)):

So again, we're wanting to create vibrant communities where residents thrive. So in my opinion, this is a pictorial that really reinforces that. And the signs are messages ... they're memory care residents are holding up for their families. Says, "Hi kids. Just a little word to say I love you." So every day ... this kind of stressed me out, but every day our memory care residents have a message that they can hold up for their loved ones. And certainly in assisted living and in independent, but we for sure have that for our memory care resident. We did a laugh of the day, the joke of the day.

Debbie ([01:08:05](#)):

And it did really well. I mean I think the ... your newsletters always give very good engagement. That monthly kind of wrap up. But this COVID newsletter got like a 25% open rate. So definitely worth ... if you're not doing an e-newsletter, same thing. And all this stuff kind of goes together. First of all, you have to have content. And then once you have content, then you can create a newsletter. And then you can watch how people are engaging and that informs you about what you should be creating more of. So our prospects will tell us what our strategy should be if we just listen to them.

Julie ([01:08:40](#)):

That's perfect. Yeah. A good example. And then just a couple other examples of experimenting before we close. In resident team member engagement, we have contests ... [inaudible 01:08:55] this tough time for everybody, and especially our team members. They're the ones on the frontline working extra hours, even to be tested and fevers taken and working with our residents. So we want to have fun contest, not just for our residents, but for them, as well. So spirit weeks, we're having a fun rock band, March madness contest. Just again, to try to infuse some fun and some vitality into our everyday workaday world, which we always need. But we need in particular right now. And Dan, right back to you.

Dan ([01:09:35](#)):

[crosstalk 01:09:35] thanks, though. I think we're at the end.

Julie ([01:09:39](#)):

Debbie.

Dan ([01:09:39](#)):

Yeah, it's back to Debbie.

Julie ([01:09:39](#)):

Oh, okay.

Debbie ([01:09:40](#)):

Yeah, just wanting to let everybody know that if you go to our website onto Senior Living SMART, there's a resources section and there's a dropdown for COVID. And we've spent the last couple of weeks curating all these resources from the CDC and WHO and industry specific. We've also had our graphic designers and copywriters come up with a whole series of posters and flyers. Which you can download all of this for free. There are sample communications to residents, families, staff members. We have some in Spanish, as well as in English. You can download any of this content and use it for engagement and education. And really set yourself up as a resource. So we just wanted to make sure, it's hard to go out and find all this stuff. Everybody has a piece of the puzzle, but we really thought to help senior living operators, we would just go and curate all of it, put it in one place.

Debbie ([01:10:37](#)):

I would say to anybody, if you have something wonderful out there that you want to share with the rest of the industry, I think as all of us work together and support each other through this we'll all come out better. So we'd be happy to share any of your resources. There are webinars on here, our blogs are on here. We'll be continuing to update this. We're looking at opening up a podcast perhaps starting next

week. We'll be adding that as well. But do check back often because there's just a ton of content here which should be super helpful. You'll just have to sign up for it. And then once you put in your first name, last name and email address, then you can just get on and download to your heart's content. So I would encourage you to do that.

Debbie ([01:11:23](#)):

And then the next thing is if there's any way that we can support you, we're here, we can help you set up a Facebook live, your virtual tours, get set up on live chat, the surveys. We can help you with paid campaigns, marketing automation. We have blogs. We got ahead a few weeks ago, and we have three copywriters full time writing COVID blogs, so if you need any content, we have a library of original keyword enriched educational blogs, as well as a COVID guide, which can all be branded and infographic. It's just a sample down there. And these are our technologies. We have a lot of questions come in throughout about, "What are the platforms that you use?" So these are some of our favorites. If you're having trouble managing inbound phone calls, and I'll tell you the better you do in putting out information, the fewer phone calls you're going to have to manage.

Debbie ([01:12:19](#)):

If you are over-communicating and pushing things out and giving people lots of ways to stay connected, you wouldn't have this influx. But if you do, SeniorVu's a great call center. You can either use them full time or to roll over after hours. Make sure people get the information they need. SiteStaff Chat is our very favorite chat company hosted by college educated Americans that were hired for empathy. We train them on senior living discovery skills. They are wonderful. HeartLegacy for video. They actually have a special going on right now, which they'll give you a free corporate account if you're having trouble having a platform to get messaging out, they'll give it to you free on a corporate level. We use HubSpot for marketing automation. Love Roobrik for the interactive surveys. And then VoiceFriend is like a service like you probably have with your schools, where they broadcast out notifications and updates via phone, email and text.

Debbie ([01:13:19](#)):

And you can plan those broadcasts out so you only have to record information once and then you can send it out through all the channels. So those are just some things that we found that are helpful. We will be sending out this presentation. We'll send out the deck. We'll have all of our contact information. Please reach out. And then we'll send out a recording, as well. So want to thank the panelists for all the time that you've given to provide this wonderful information. And I think if we all stay together and support each other through this, we'll build better skills and we'll innovate, which is wonderful. So Dan and Amanda and Julie, thank you so much and thanks for everyone who joined today. We do have another webinar coming up next week about recruiting and hiring. So that should be a hot topic, as well. So we're here for you and let us know how we can be a resource. Thanks so much everybody.

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