

Senior Living Marketing Perspectives Podcast



Senior Living **SMART**

Inspired Marketing, Savvy Sales, Better Operations



Senior Living Marketing Perspectives: Podcast

Senior Living Marketing Perspectives presents strategic interviews with industry leaders on best practices, new ideas and insights to help overcome today's challenges facing the senior living industry. Debbie Howard, CEO of Senior Living SMART brings top leaders to discuss strategy, technology and innovation in Senior Living. Our guide gives you the Top Podcasts for Season 1, with episode overview and a direct link to the podcast. A great way to catch up with industry trends and challenges.

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Business, Sales and Marketing Advice with Doug Davidoff

Topics Discussed and Key Points:

- How businesses can communicate with their target market to design better services
- Creating an environment that makes prospects stay comfortable while in the pipeline
- Tried-and-true advice for all sales professionals
- The ever-evolving relationship between sales and marketing
- Considerations around “high-tech, high-touch”
- Identifying the touches that matter and ignoring those that do not matter
- How letting go of (your feeling of) control gives you more control as a company
- Creating a solid structure for your business to spark more creativity among your team
- The truth about friction in the sales process and how to use friction to your advantage
- The difference between a “challenger” and a “provoker” in sales

Episode Summary:

In today's episode, Debbie speaks with Doug Davidoff, Founder and CEO at Imagine Business Development, a management consulting firm that has worked with over 1500 small and mid-market businesses. Doug describes his career as being about “eliminating or mitigating the conflict between buyers and sellers,” an approach that is applied at Imagine.

Imagine has discovered that most organizations already have the raw material to achieve what they want to achieve. What they need is the correct recipe to make their vision a reality. Doug says that the problem usually lies more in what organizations are already doing and have to unlearn as opposed to what they are *not* doing. Imagine ensures that their clients maintain the structure of their respective businesses “to enable them to achieve predictable, sustainable, and scalable growth, however they define ‘scalable.’”

Imagine has worked with countless businesses in many different verticals, and the number one issue that Doug found is *a lack of empathy*. Instead of creating a product or service from assumption alone, companies need to see the world through their customers' eyes. In addition, companies have a tendency to “try too hard” or overestimate what they can do. Sales professionals simply need to solve for x. They need to map their customer's journey to make their subsequent decisions more informed.

Historically, salespeople were responsible for communicating the value proposition. Today, that has become marketing's job. Sales professionals now “facilitate the decision using the resources that marketing has created to reduce the effort involved to make a high-risk decision.” Sales and marketing, previously siloed departments, now work parallel to each other.

“Your job is not to sell the community,” says Doug. “Your job is to help somebody make a good decision about where they should spend their senior years.” With sales and marketing working in tandem, operating by the principles of empathy, the entire process becomes smoother. As Doug says: “The single best thing a company can do to increase sales is to make it easier for someone to buy.”

Links:

[Imagine Business Development](#)
[Doug Davidoff on LinkedIn](#)



Adopting New Technology to Promote Well-Being with Sagely with Hollie Kemp

Topics Discussed and Key Points:

- How Sagely’s platform adds convenience for everyone in a senior care facility
- The importance Sagely places on personal, one-on-one connection
- How operators can take advantage of Sagely’s technology to reduce prospect friction
- Helping residents adopt new technologies
- Activities that have the highest engagement and preparing for the next generation
- Customizing Sagely’s platform to different groups
- Sagely’s remote learning capabilities and future on-demand initiatives

Episode Summary:

In today’s episode, Debbie speaks with Hollie Kemp, Chief Operating Officer at Sagely, a Honolulu-based IT company that “marries the power of software, data, and the human element to empower caregivers, elders, and their families to improve elders’ well-being. Sagely is a platform to document, manage, and navigate the tracking and delivery of engagement and care programs” that can be used by both residents and their families.

Hollie started out in the senior housing space over 20 years ago as a unit assistant. Through the years, she took on various roles, from caregiver all the way up to Chief Experience Officer. With a primary focus on memory care and engagement, her passion is quality of life and designing stellar lifestyles for the seniors in her care.

Hollie agrees with Debbie that the pandemic has served as an “accelerator” that has forced operators in the industry to focus on making their systems and processes more effective and efficient. Sagely in particular has had to fall back and reflect on their core mission to “keep elders happy, healthy, independent, and connected”.

This required them to create a two-pronged approach for 2020 and beyond: develop technology that is simple to use for residents who may not be tech-savvy, and “free up more time and also provide more efficient tools for that engagement director to meet their residents’ needs at all times.”

Hollie has noticed that, amid the pandemic, “people are less focused on limitations and more focused on possibilities”. The adoption of new technologies today should not actually be as difficult as many make it out to be, even in the senior living space. What makes the difference are the goals you have going into a project, how you hold your team accountable to those goals, and why those goals matter.

“In my opinion,” says Hollie, “in senior housing, technology is never replacing human touch. I do not believe that’s possible. I still think we’re a human business. Technology just enables the human to do their job better.” And this outlook should extend to those initiatives that technology aims to make possible. “A program,” continues Hollie, “can be wonderful on paper, but if it’s not alive in the community, it doesn’t matter.”

Links:

[Sagely](#)

[Hollie Kemp on LinkedIn](#)



The Science of Conversions and Optimization with Brian Massey

Topics Discussed and Key Points:

- Looking at the science of conversion and not just the art
- Using behavioral science to understand the thought process of prospects
- What data we should be looking at that informs strategic conversations with prospects
- Tools to help track engagement metrics
- Updating your website and communication tools to adapt to social distancing limitations
- Designing a website that gradually educates cold prospects to warm them up over time
- Creating content and designing web pages for different segments
- Designing your website as a draftsman rather than as an artist
- Optimizing your website for the mobile experience

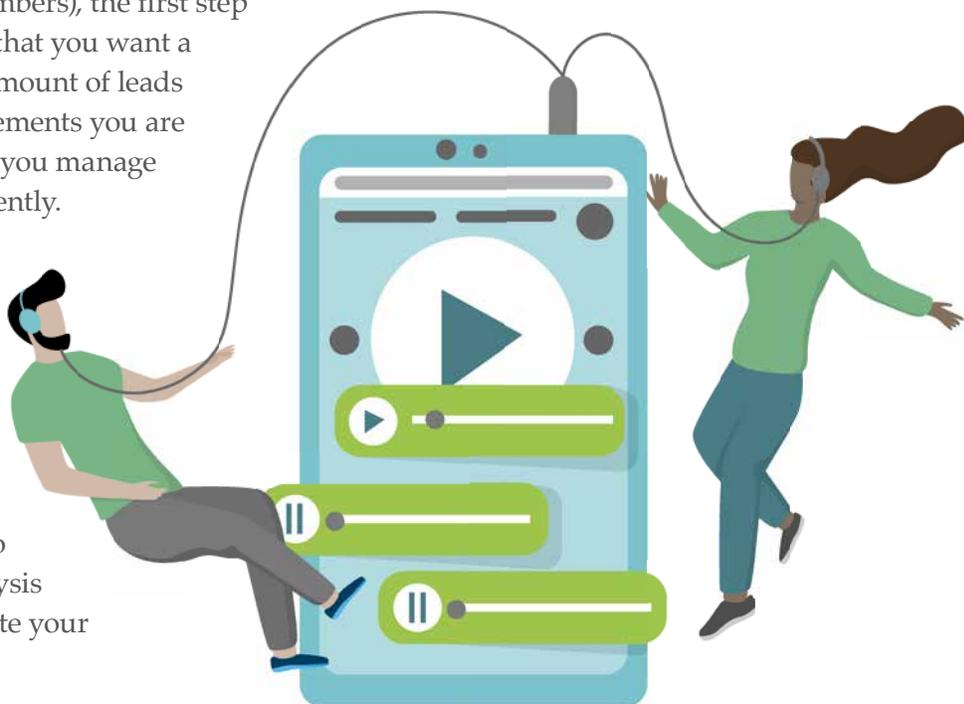
Episode Summary:

In today's episode, Debbie speaks with Brian Massey, Managing Partner at Conversion Sciences, a data-driven conversion optimization agency which seeks to "find those impulses to act that are hidden in your site."

If you are counting on the internet to drive your business, you cannot manage it without having access to behavioral data. Brian says that his role is not just the scientific complement to the art of marketing, but one that allows the marketer to "expand their art to be more creative".

Most businesses today do not need more leads, but more conversion. If they are aware of the data indicating the number of visitors, conversions, and the bounce rate (many companies do not even track these numbers), the first step is to look at the primary call to action that you want a particular page to make. Look at the amount of leads you are driving and how many engagements you are getting. Understanding the data helps you manage your relationship with visitors intelligently.

Bounce rate is a great measure of the quality of the traffic on your website. There is a constant tension between getting more traffic and making the landing experiences better, and there is not necessarily a correlation between the two. Troubleshooting the experience to get more conversions requires an analysis of the visitor's behavior as they navigate your site or landing page.



Your website should always be updated to adapt to changes in the market. On the most practical level, this means looking at engagement metrics not just to know that data, but to know how to take action based on those changes.

Conversion optimization is “an assembling of segments”, starting with the largest segment in the early stages of your business. Personas are a great tool for understanding what those segments are so that you can keep track of the types of visitors on your website. As you scale and become more sophisticated with your site, you can have more offers targeted toward specific segments. In the senior living space, some of those segments could include the adult children, seniors who would rather live in their home, and seniors who prefer a community.

You should have a variety of content that caters to these different segments, and have pages on your website specially designed for these different kinds of content. Analytics will show how different segments behave differently on the pages you designed specifically for them.

Links:
[Conversion Strategies](#)



Evaluating your Digital Presence with Andy Crestodina

Topics Discussed and Key Points:

- How the senior care space has transformed in 2020
- Managing your online reputation
- When and how to update your website
- Differentiating yourself with intentional copy
- Pushing sales messaging into the marketing funnel
- Creating content in 2021
- Maximizing the conversion experience by incorporating *flow*
- When to automate your processes
- What tools operators should consider for their 2021 marketing budget

Episode Summary:

In today's episode, Debbie speaks with Andy Crestodina, co-founder and Chief Marketing Officer at Orbit Media, an award-winning 38-person digital agency in Chicago.

The challenges we have seen in 2020 accelerated the trend toward the empowered prospect. There is more content than ever before for potential clients or customers to go through, which allows them to make a decision on a product or service even before meeting a representative of the company. Before, to learn what a business offered, you had to talk to people. Today, for many businesses that is no longer the case. The responsibility of a marketer, therefore, is to help prospects make a great decision by considering their product as an option.

The foundation of your marketing efforts is evaluating your digital presence (and those of your competitors). From being present on most of the major social channels (depending on your demographic) to making sure you show up at the top of Google results, having both quality and quantity in your content marketing efforts should be one of the first major goals of your business.

When it comes to designing and updating your website, *always think about the perspective of the visitor*. The site does not have to sell; but it has to give sufficient information to the visitor. The job of the website is to answer questions. What are their questions? What are their concerns? Which of those questions and concerns are among their top priorities? What are our best answers for those questions, and what evidence can we add to support those answers? When you know these things, you are ready to build a high-converting website. The job of the website is to give visitors sufficient clarity and trust (i.e. answers and evidence) to get them just over the psychological threshold toward contacting you.

Asked about producing the right kind of content in 2021, particularly for the senior living space, Andy encourages operators to focus on the bottom of the funnel. *Take care of your current prospects first: those who are already brand-aware*. Many cold prospects may continue to have low intent going into the new year and might not be ready for anything—not even the initial call.

Bottom-of-funnel content that answers sales questions should be prioritized; but also use this strategy to grow your email list. Work hard on the call to action to subscribe to your newsletter, because growing your email list puts you in control of your marketing destiny, unlike your social media platforms. Keep your subscribers in flow by keeping them engaged with a tailored content experience that regularly gives them value while keeping you top-of-mind until they are ready to take the next step.

Links:

[Orbit Media](#)

[Orbit Media Studios on YouTube](#)

[Andy Crestodina on LinkedIn](#)



Uncovering New Insights in the Senior Living Industry with Alex Fisher from Sherpa

Topics Discussed and Key Points:

- Insights uncovered about the senior living industry in March, April, and May
- Making the best out of fewer leads
- Adapting sales training and hiring practices to the new normal
- Confronting fears by tapping into your motivations

Episode Summary:

In today's episode, Debbie speaks with Alex Fisher, Co-Founder of Sherpa CRM. As the impact of COVID-19 continues to influence all major business decisions, Debbie and Alex discuss data insights for March, April, and May, released recently by Sherpa.

This data provides a qualitative indication of the sales and outcomes of a sample size of about 82,000 units of independent living, assisted living, and memory care facilities. In making sense of the information, Alex stresses that “the sales process should not be predicated on the level of care, but on the person.”

While leads have been down across the board, Alex says that sales and marketing professionals have always tended to “underwork” prospective buyers anyway. With the pandemic causing everybody to pay better attention to the leads that they *do* continue to generate, there is now an opportunity to put more focus and care into each individual prospect. Says Alex, “Our philosophy is that the new lead is not necessarily going to be better than the old lead. As a matter of fact, there is gold in your existing leads. Some of them may have been resistant to your efforts for a while, but they still exist.”

With fewer leads to work with, Alex emphasizes the importance of really getting inside the heads and the hearts of both the potential residents and their families. Specifically, what is going on in their world as they prepare to make the life-altering decision of whether or not to move into a new community, especially in the face of these challenging times? Making the effort to be truly empathetic to your potential customers’ desires always leads to more sales. As Alex eloquently puts it, “Shallow engagement leads to lower conversions.”

Even before COVID-19, Alex says that much can be done to improve sales training and what to look for when hiring salespeople. For one, there tends to be an overreliance on product. In an industry full of “glorified tour givers”, she calls for refocusing the focus of sales training onto the *prospect* by letting go of the outcome. This requires emotional intelligence through self-awareness and embracing the fact that salespeople are “facilitators of change” who help break down emotional barriers so that prospects can have the confidence to make adjustments in their lives.

Links:
[Sherpa CRM](#)
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Talking Elder Resource Benefits Consulting with Patty Servaes

Topics Discussed and Key Points:

- A primer on the VA's Pension Benefit
- Potential amounts that veterans and/or their spouses can avail of with the VA Benefit
- Assets and other factors that count toward eligibility for the VA Benefit
- The time it takes to receive the VA Benefit
- The role of annuities
- How senior living operators are leveraging the Benefit and where they can improve

Episode Summary:

In today's episode, Debbie speaks with Patty Servaes, a VA accredited agent and the founder of Elder Resource Benefits Consulting. ERBC was founded in 2005 to help seniors navigate different benefits that are available to them. Their specialty is the VA's Basic Pension with Aid and Attendance Benefits. The company focuses on veterans getting the VA's Pension Benefit as quickly as possible as soon as they are eligible for it.

"This is not a 'yes' or 'no' Benefit," says Patty. "It's 'if' and 'when.'" She explains the VA Benefit through the image of a staircase, having three main criteria that build on each other: *"Did you serve in a period of war?"*; *"Do you meet the medical criteria?"*; and *"Do you meet the financial criteria?"*

It is critical for a U.S. veteran—Army, Navy, Air Force, Marines, and Coast Guard—to know the "if" and the "when" so that they do not miss even a month's worth of the Benefit. In 2020, a surviving spouse can get up to \$1228 per month, tax free. A single veteran can get up to \$1911 per month. A well veteran with an ill spouse can get up to \$1500 per month. A married veteran where the veteran himself needs care can get up to \$2266 per month. Patty goes into detail about which assets and other factors count toward eligibility for the Benefit.

In evaluating a veteran's eligibility for the VA Benefit, ERBC looks at their income and assets to be able to tell exactly when they would be able to qualify. They also give advice on what they can legally do with the money, such as paying down a car loan or prepaying their funeral. Patty, however, does not recommend the latter. Rather, she suggests having the VA reimburse the funeral costs after the funeral itself. "I really like holding the VA's feet to the fire and making sure that, if at all possible, we get that VA money to the claimant or, in the event of their death, to the assisted living or to the family."

Links:

[Elder Resource Benefits Consulting](#)

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Welcome Home - A CRM Platform Designed Specifically for Senior Housing and Care with John Lariccia

Topics Discussed and Key Points:

- How John came to develop a CRM platform specifically for the senior living space
- Welcome Home's five, non-negotiable pillars for an industry-friendly CRM
- Giving operators greater freedom of choice through integration
- The impact of Welcome Home's CRM on a community's bottom-line

Episode Summary:

In today's episode, Debbie speaks with John Lariccia, founder of Welcome Home, which provides a CRM platform designed specifically for senior housing and care.

John identified the gap in the market upon understanding that the sales process is particularly difficult within the senior living space. He points to the fact that "there are so many constituencies that you have to interact with". The emotional layer of the process is also particularly unique due to the nature of the industry. John realized that traditional CRM technologies did not adequately account for the complexities of the human element of closing sales that is especially important in senior living.

John had to solve for a solution that covered all the considerations of an operator in the senior living space. Being a newcomer to the industry, John took the time to dissect traditional CRM platforms to identify missing features which can be highly useful to a senior living operator. He spent over a year speaking to experts in the industry and honed in on five, non-negotiable pillars for their technology: *automation, customization, reporting, mobility, and simplicity*.

Asked how adopting Welcome Home's CRM makes sense from a business standpoint, John says that his team tracks engagement and adoption, time savings, time allocation, results from that allocated time, and other expenses. 93% of users, his team found, are using the entire functionality of the CRM within the first month, and this jumps to over 99% by the second month. Operators are also saving thousands of dollars in training budgets due to the CRM's simple and intuitive interface. Finally, rote tasks are being successfully automated, allowing sales directors to reinvest that saved time into outreach. All of these factors, among others, are resulting in better conversion ratios. "The CRM is working for them," says John. "They are not working for the CRM."

Links:

WelcomeHomeSoftware.com



Learn About Senior Living Growth Advisors with Scott McCorvie - How the Pandemic has affected the Senior Living Industry

Topics Discussed and Key Points:

- How Scott's passion for senior living led to the founding of Senior Living Growth Advisors and his podcast
- The impact of COVID-19 on Senior Living Growth Advisors
- How the pandemic affected design in the senior living communities, both existing and in development
- Adapting to restrictions and other lifestyle changes brought about by social distancing measures
- Emerging technologies operators are using to redefine the senior living experience

Episode Summary:

In today's episode, Debbie speaks with Scott McCorvie, President of Senior Living Growth Advisors, and host of The Inner Circle of Senior Living podcast. With 15 years of experience in the senior care space under their belt, Senior Living Growth Advisors assists everyone from owners to developers to investors to operators in optimizing their platform and achieving their desired growth success. Scott's podcast is dedicated to providing value to the senior living investment industry by hosting discussions and interviews with experts and thought leaders in the field.

Scott believes that the senior living industry has remained resilient in the face of the pandemic and the impact it has had to the economy for the past several months. Investment and development projects have been put on hold and due diligence for acquisitions are delayed. On the other hand, Scott has seen more action in the asset management department as organizations adapt and even innovate amid the various challenges.

To remain competitive, independent living facilities had to have over 50% of their space dedicated to common usage or amenities. This can include anything from movie theaters, libraries, exercise rooms and yoga studios, to even woodworking. But it is those communities whose facilities are expertly designed who have the greatest edge over others who have activity rooms in place but receive little engagement from residents.

Scott recommends, particularly for those communities still in development, to establish centrally located, multipurpose common areas that, on the same day, can be reorganized from a lecture hall into an exercise studio. Marketing a senior living community, after all, is showing off a potential "lifestyle upgrade", and that impression is sold if prospects can see a thriving, activity-filled space.

In addition to adding infrastructure to bolster the health and safety of residents, especially during the pandemic, Scott says that Innovating the senior living experience also relies on improving engagements between caregivers and residents. This can be accomplished through such implementations as voice-activated technologies which make communication more efficient, or TV screens which display the day's activities or messages from staff and fellow residents. There are many ways to improve the senior living experience, but Scott encourages operators to be particularly bullish on leveraging as much technology as possible to increase resident engagement.

Links:

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Mom's House - Connecting Families Selling their Senior Parent's Homes with Buyers with Ben Rao

Topics Discussed and Key Points:

- The motivation to create Mom's House
- How Mom's House's certified home buyers save families' time and money
- Growing the Mom's House network of home buyers and senior living communities

Episode Summary:

In today's episode, Debbie speaks with Ben Rao, Co-Founder of Mom's House, a platform which connects certified home buyers with families who are in the process of selling their senior parent's house. Mom's House is known today as "the nation's largest senior home buyer network".

At some point during Ben's career as a real estate investor, he got connected to the founders of Family Solutions for Care, which "indoctrinated" him into the senior space. He realized through this partnership that it is a common problem among families to not have the support of an insurance company as they look to enter a care community. It so happened that Ben was also connected with a real estate investor focused on the senior space, who did over 50 transactions a year through referrals alone. The two teamed up to discuss how to fill this gap in the market, leading to the founding of Mom's House.

Many families lack the resources and knowledge to get a house listed when it is time for their senior members to move into a care community. Hiring a real estate agent is often their only option, and even in this case it takes around four to six months to finally sell the house. That is, if the family is able to shoulder unexpected expenses and prepare for potential delays throughout those months. Mom's House changes the game by connecting home buyers certified by the company around the country to these families. Buyers then make an offer to buy the house for cash and close the deal in less than 30 days.

Links:

[Mom's House](#)



Re-imagining Marketing Strategies in Senior Living with Jeannette McClennan Following COVID-19

Topics Discussed and Key Points:

- How senior living providers can change their marketing strategy following the impact of COVID-19
- Reframing the message of an industry under fire by mainstream media during the pandemic
- Why websites should not limit their assurances regarding COVID-19 to a single page
- Tips on using visual materials such as infographics to improve a brand's messaging
- Differentiating your assisted living facility from a nursing home

Episode Summary:

In today's episode, Debbie speaks with Jeannette McClennan, Co-Founder and President of McClennan Masson and co-author of the book *Innovators Anonymous* (2018).

Asked how senior living providers can change their marketing strategy in the wake of COVID-19, Jeannette notes that universities are facing deep occupancy issues not unlike those of the senior housing industry.

There are five factors that universities are focusing on which senior living providers can adopt in order to "reimagine" the industry during these turbulent times: occupancy strategy, testing, temp checks, scientific counsel, and communications strategy. The goal is to raise the comfort level of parents as they look to bring their children onto campus, just as adult children who are finding a home for their aging parents need assurance.

Another observable connection between universities and the senior housing industry is the need to shift marketing strategies and budgets to digital. It is "an opportunity to reinvent your brand and switch up your messaging" to adapt to current challenges.

The senior living industry has gotten a bad rap lately in the media. It is important to reframe the message in a way that is authentic yet direct; comforting yet truthful. Jeannette recommends "overcommunicating in advance" to nip fear and doubt in the bud as opposed to doing damage control after the fact.

Style of communication is also key. It is important to "personalize the message down to the individual", which is best accomplished via a storytelling format using video featuring authority figures. Jeanette recommends providing a personalized, gamified experience for them on your website to bolster familiarity and trust.

Finally, communities should involve the adult children in their messaging, not just the potential residents, in order to get everyone comfortably on board in making this critical decision.

Addressing COVID-19 should go beyond a single webpage. It requires a complete rethinking of the business's message. "How do you express *safety* unique to your brand? Demonstrate it throughout your experience, including through your social presence."

Links:

[McClennan Masson](#)
[Innovators Anonymous](#)



Learn about SMASH - The Senior Marketing and Sales Summit with Bailey Beeken

Topics Discussed and Key Points:

- The origin of the SMASH conference
- How SMASH has evolved over the years
- Topics to expect at SMASH 2020
- Lead generation, conversion, and management during and after COVID-19
- Reimagining sales and marketing in the new normal
- Interacting with prospects with virtual tools

Episode Summary:

In today's episode, Debbie speaks with Bailey Beeken, President of Senior Care Events and the Founder of SMASH—the Senior Care Marketing and Sales Summit.

Bailey discusses the concept behind SMASH, which was established in 2013. This series of conferences brings together C-level executives in the senior living industry, "curat[ing] the best of the best in leading edge marketing and sales."

In its first year, the conversation was around social media and other branding platforms such as websites and how they can be used to market the company. In the following year, the focus shifted towards content creation and digital advertising for driving leads to these platforms. A couple of years ago, the primary topic became data management and how to create budgets and strategies around it. This year's conference set for October 19-21 will go into considerations and best practices in a post-COVID-19 world.

With fewer leads coming in and heavy criticism from the media during these uncertain times, Bailey acknowledges that it is time for the senior living industry to "throw out the old playbook" and lead with purpose by "spending 80% of the time nurturing the 20%". Communities must tailor their messaging around concerns regarding health, safety, and family by producing *content at a cadence* that is appropriate to the current climate. "We really have to reimagine the entire prospect journey and recreate all of those in-person activities [online]," agrees Debbie.

It is important for organizations to take advantage of virtual tools to connect and strengthen their relationships with families. "People are going to have to act with urgency. It is not just about getting revenue. The first movers will win here. They will not have all the answers, but they are willing to experiment. [...] We have a lot of work to do to counter the message that has been told this past year and everybody has to get onboard with that."

Links:

[SMASH 2020](#)

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Jennifer Hastings Connects Families with Residents Through Engaging Marketing Campaigns

Topics Discussed and Key Points:

- How putting a pause on move-ins affected Northbridge
- The “Northbridge Good Vibes” campaign
- Platforms that Northbridge is using to connect with families
- Northbridge’s creative magazine ad that focused on the people rather than the facility
- What prospects will look for in a senior living community going forward
- The “Behind the Mask” campaign

Episode Summary:

In today’s episode, Debbie speaks with Jennifer Hastings, Vice President of Marketing at Northbridge Companies.

In March 2020, Northbridge made the decision to shut down move-ins as other assisted living communities have done in the wake of COVID-19. From a marketing standpoint, Jennifer knows that the process will have changed in one way or another once the day comes when facilities can start accepting new residents again. However, a few key things will remain the same, such as leveraging social channels to be able to engage regularly with existing and future families.

Jennifer talks about the Northbridge Good Vibes program that she and her team launched not long after the outbreak. This is a cross-platform campaign where families can contribute to an encouraging and uplifting atmosphere throughout the community by leaving well-wishes across different forums and social media platforms. She relates how Northbridge’s Good Vibes page received an unexpected 75 “vibes” in the first night alone.

Aside from the Good Vibes initiative, Jennifer talks about the other out-of-the-box ways that Northbridge has adapted to the challenges brought on by the pandemic. From taking advantage of the industry-tailored features of the HeartLegacy app, to a magazine ad that highlights *people and families over facilities*, to the creative “Behind the Mask” campaign, Northbridge has skillfully focused its marketing efforts toward people and community. This type of messaging, Jennifer believes, is what will resonate the most with future residents post-COVID-19.

“Choosing a senior living community means that you have peace of mind around care, safety, and well-being,” says Jennifer. “It is what people have always inherently been looking for, but today they are looking through a new lens because of what we have all been through.”

Links:

[Northbridge Companies](#)

[Northbridge Companies on Facebook](#)

[Northbridge Companies on Instagram](#)



Dan Tyre Unleashes a Treasure Trove of Inbound Marketing Best Practices

Topics Discussed and Key Points:

- How the internet and social media changed the lead generation game
- Why marketing is more important than sales
- Qualities of an inbound organization
- The basic philosophy and foundational principles of inbound marketing
- What touchpoints to put in place to qualify leads as reliably and efficiently as possible
- Why having happy customers is more important today than ever before
- The difference between marketing qualified leads and sales qualified leads and how to advance each
- A primer on lead scoring
- Best practices around workflows and marketing automation
- Why use HubSpot?

Episode Summary:

In today's episode, Debbie speaks with Dan Tyre on inbound marketing and marketing automation. Dan is the author of *Inbound Organization: How to Build and Strengthen Your Company's Future Using Inbound Principles* (2018). He is a speaker, blogger, mentor, and coach for those who want to harness the power of inbound marketing to improve their bottom line. Dan joined HubSpot as a member of the original team in 2007, and today serves as the company's Sales Director.

Potential buyers, both B2B and B2C, like to consider their options anonymously if possible, and oftentimes do their research well in advance of making their final decision (sometimes up to a year or so) depending on the size of the investment. What they see, in the absence of a salesperson (who they wish to avoid at all costs) is paramount to making the sale. This is why, according to Dan, marketing is more important than sales.

As opposed to focusing purely on sales, "the attributes of an inbound organization is they like to help people," says Dan. "They do things out of the goodness of their heart." In fact, in 2014, Dan published an article titled "Always Be Closing Is Dead: How to Always Be Helping".

As little as ten years ago, there were more gatekeepers and other such hurdles to reach prospects. You had to pick up the phone and make calls. Today, the amount of online tools and platforms you have at your disposal makes inbound marketing an available option even for smaller companies. On the other hand, the average company has 44 competitors today. As Dan stresses, it is important to "add value before you extract value" if you want to stand out.

Listen in as Dan unleashes a treasure trove of best practices for today's inbound marketer, including how to define your persona, qualifying (and disqualifying) prospects, creating an effective sales funnel, and HubSpot's competitive advantage over other growth platforms.

Links:

www.dantyre.com

Email: dtyre@hubspot.com

Order a copy of his book at

<https://www.inboundorganization.com>



Today's Senior Living Prospects Have a Greater Sense of Urgency About Their Senior Living Options with Nate O'Keefe

Topics Discussed and Key Points:

- Roobrik's purpose and unique approach to gathering data
- Gathering data and building trust via anonymous "conversational assessments"
- What senior living operators can learn from data gathered by Roobrik
- How COVID-19 has impacted prospect behaviors and uncertainties
- Other potential uses for Roobrik's decision science technology

Episode Summary:

In today's episode, Debbie speaks with Nate O'Keefe, Founder and CEO of Roobrik, "a survey or decision tool that helps older adults and families get unstuck [and] activate that audience that is right on the cusp. How can we help them understand their needs; their options?" Roobrik's solution? Decision science. Their goal is not to market senior living as a prospect's only choice, but to better inform them so that they can make that choice themselves.

The typical senior living company website is, unfortunately, little more than an online brochure filled with impersonal stock images. "Nobody searches for senior living for fun," says Debbie. Marketers have to make that extra effort to not only lead prospects to their website, but also to create comfort in order to help these prospects make life-altering decisions about their future.

Roobrik gathers relevant information that helps prospects see if they are a fit for a community. They also put together resources that engage and build trust for those who are looking for options. Data is gathered through anonymous "conversational assessment" with the prospects which take their mindset into account, particularly with regards to their fears and worries. The assessment is anonymous because fears and worries, which prospects tend to minimize during the initial call, are the biggest challenges that operators need to tackle when promoting a new lifestyle as a possible solution.

Prospects need to feel empowered and informed. Roobrik's tool helps potential residents "overcome uncertainty and inertia" which, again, is why data is gathered anonymously. COVID-19 has obviously had a profound effect on the gravity of prospects' doubts around senior living spaces.

Nate acknowledges that perspectives will continue to evolve in the new normal. To gain a foothold over these ever-changing uncertainties, Roobrik asks, "What can we do that is additive and not noise?" The key is in gathering data, which serve as the foundation for any strategy. To this end, Roobrik has released "COVID impact reports", which reveal that more people are looking—that prospects have developed a greater sense of urgency about their future options and are more willing to engage in conversations that will help them get unstuck.

Links:

www.roobrik.com



What the Most Successful Senior Living Companies During the Pandemic are Doing Differently with Val Whitman

Topics Discussed and Key Points:

- The new channels Leading Response is leveraging to continue introducing people to their clients
- Is direct mail still a useful marketing tool today?
- What types of content are prospects looking for in the new normal?
- How to nurture and advance leads who are already in the pipeline
- Measuring ROI
- An easy way to double your click-through rate
- What the most successful senior living companies during the pandemic are doing differently

Episode Summary:

In today's episode, Debbie speaks with Val Whitman, VP of Senior Living at LeadingResponse, on marketing, thought leadership, and innovation. LeadingResponse is a client acquisition firm with a focus on connecting qualified leads—adults, children, seniors—with the senior living client to nurture their relationship. This is best done is face-to-face, preferably onsite; but in the new normal, the company was forced to adjust its primary strategy.

Fortunately, along with organizing in-person events, LeadingResponse has solutions for connecting people to their clients using online campaigns. Today, these campaigns have taken center-stage.

LeadingResponse has a webinar platform that has proven to be their most popular tool for educating and building relationships with existing consumers. Using white-labeling capabilities available on the platform, clients can customize this visual experience to navigate the new normal with their prospects with ease.

Prospects today are still looking for the basic information they have always wanted and needed; i.e. the differences between care levels, how costs are covered, how to have tough conversations with loved ones, etc. But now they also want to know how a company, as a brand and as a representative of their industry, can keep their loved one safe. The client needs to take this opportunity to showcase the benefits of staying at a senior living community during the pandemic.

During these uncertain times, labor costs have generally gone up, as well as budgets for supplies, which could include test kits. Organizations need to learn how to do more with fewer dollars. It is important for a business to look at the tools and platforms that they currently employ, including webinars, direct mail, and virtual tours, and measure the ROI on each. If there is a problem in the execution of these tools, consider small solutions first. Sometimes, it is just a matter of changing the content or call to action.

In some cases, improving ROI is also about sales execution. Are people following up with prospects? Are they even reaching out to new leads on time in the first place?

Links:

www.leadingresponse.com

[Valerie Whitman on LinkedIn](#)



Senior Living Marketing Perspectives: Capturing the Essence of Your Residents to Market Lifestyle with Tom Sanders

Topics Discussed and Key Points:

- The lackluster quality of most stock photos depicting seniors
- What it is like to work with 80+-year-old models, including those with cognitive disabilities
- Why Tom incorporates stories into his photos
- How senior living facilities can improve their marketing by showcasing quality photos
- Justifying the cost of quality photoshoots for marketing purposes
- Rebuilding trust in senior living communities post-COVID 19 through photography

Episode Summary:

In today's episode, Debbie speaks with Tom Sanders, a professor of photography at Savannah College of Art and Design and the founder of Senior Living Photography and Senior Stock Photos. He is the author of the coffee table books *The Last Good War: The Faces and Voices of WWII* (2010) and *Vietnam War Portraits: The Faces and Voices* (2020).

Debbie considers Tom to be the best in the senior photography niche which, she laments, is severely lacking. She notes the oftentimes routine, inaccurate, and sometimes even silly representations of seniors in traditional stock photographs. One reason for this, addresses Tom, is that many senior living companies are unwilling to invest in high-quality photoshoots.

Debbie also criticizes run of the mill photos as idealized images of prospects that lack relatability (i.e. models are often a decade or two younger than the usual senior living demographic). Tom, on the other hand, is unafraid to literally get up close and personal with the people he is trying to represent. Debbie points out that many of Tom's photos clearly display the wrinkles of his 80+-year-old models. They are posed simply, their humanity, personalities, and vulnerabilities all laid bare.

Tom encourages more photography companies to take advantage of the stories that seniors have to share, so as to bring out the individuality of every single model. It is this level of care and openness that helped *The Last Good War* to earn the title of "Non-Fiction Book of the Year, Editor's Choice" by the Forewords Review Magazine.

Companies should be willing to invest in better quality photos of their seniors the same way they are already used to spending on photos of their facility. After all, a marketer's job is to sell lifestyle, not real estate.

Links:

www.seniorstockphotos.com

www.seniorlivingvisuals.com



Reimagining the Prospect Journey with Jeff Gronemyer

Topics Discussed and Key Points:

- Key impacts of COVID-19 on the senior living industry in China
- The importance of building relationships with prospects amid COVID-19
- Useful technologies and other strategies to engage with prospects during quarantine
- How to “check the temperature” of your lead base during these turbulent times
- Training salespeople that can effectively navigate the current climate

Episode Summary:

In today’s episode, Debbie speaks with Jeff Gronemyer, Director of International Census Development with Meridian Senior Living. He gives a global perspective on the impact of COVID-19 on the industry. Overseeing sales efforts for Meridian in China, Jeff is essentially a couple of months ahead in terms of best practices for interacting with prospects during the pandemic.

In China, Meridian has completely shut down their buildings. The question prospects lead with is no longer, “When can we move in?” but, “What can you do to keep my mom and dad safe?” Meridian has shifted its marketing and sales to cover common concerns brought about by the new normal. This includes helping seniors gain easier access to produce and other basic necessities. There have also been a number of changes to protocols for moving in particularly with regard to making sure that health and sanitation take precedence over all else, while of course keeping the process comfortable and fear-free for seniors.

During a time when communication is more important than ever for closing prospects in the senior living industry, Jeff says that there is now more focus put into the relationship aspect of things. Building a relationship with the prospect while leading them through the sales process has always been a tricky balance. The difference today is that prospects will not be moving into facilities until further notice, and so the pressure to close in advance is no longer there. This simply means taking the time to have meaningful conversations with prospects. One way that Meridian encourages its sales staff to adopt this focus is through sending information on relevant topics to chat about with seniors, such as historical events ranging from 1960 to 1976.

This is a time to experiment and innovate with different technologies and other strategies to engage with prospects. It is also important to discover the changing attitudes, mindsets, and goals of your client base. Reach out—whether through surveys or focus groups—and soak in the different hopes, worries, and fears that prospects are currently experiencing. This is especially important since senior living communities are being dubbed as dangerous “petri-dishes” by certain media institutions. In order to respond to these messages, there is no better strategy than to communicate on a more intimate level with those you are looking to serve.

Links:

www.meridiansenior.com



The Secret Sauce for Successful Live Chat with Bill Jennings

Topics Discussed and Key Points:

- SiteStaff Chat's edge over other conversion services
- The two types of prospects that chat support representatives typically engage with
- How SiteStaff's engagement specialists conduct conversations with prospects
- The importance of earning the right to ask for a prospect's personal information
- Why Bill is passionate about *empathy and culture*

Episode Summary:

In today's episode, Debbie speaks with SiteStaff Chat Founder Bill Jennings on how prospects for senior living facilities engage with Chat's online support staff. Bill founded his company as a response to the many other support services that have the unfortunate tendency to offer generic, information-laden responses to website visitors. Instead, SiteStaff Chat's approach is that of "an emotional selling process; making people feel comfortable." This approach turned out to be the perfect fit for the senior living industry, of which the emotional component is naturally higher among prospects.

SiteStaff Chat typically sees two types of customers. The first type are family members looking for a place for their aging parents, but have little to no idea what to expect from or how to go about the process of moving them into a senior living facility. The second type are those looking to move themselves into a facility simply because they are looking for community and, of course, assistance. In both of these cases, support staff need to be both empathetic and understanding as they work to dispel prospects' common fears while guiding them towards a decision.

Chat's engagement specialists are looking to provide real answers to prospect queries, as opposed to canned ones. Bill laments the "copy-paste" tactics of traditional services, where answers are scripted and superficial. Chat aims to qualify the prospect, not by attempting to methodically close them, but by "humanizing the experience", first by establishing whether there's even a fit for them in the first place, followed by diving into specifics around the prospect's particular circumstances and goals.

Today, Chat's representatives spend an average of eight and a half minutes chatting with prospects. These eight and a half minutes are not spent giving an elevator pitch, but on having real, human-to-human conversations that aim to earn the right to ask the prospect if they are ready for the next step of the transaction.

When much of the modern marketing world focuses on vanity metrics such as views, impressions, clicks, or website traffic, it is crucial for a company (and refreshing for prospects) to create personal experiences that give visitors real value. After all, senior living communities deal with high-intent prospects. By empowering these prospects to make informed decisions through meaningful conversations, any business can achieve more of the metric that truly matters: conversions.

Links:

Try SiteStaff Chat for 30 Days Free of Charge by visiting www.sitestaffchat.com or give Bill a call at (303) 349-4282



Creating an Effective Sales Culture in Senior Living during Covid-19 with Mike Miller

Topics Discussed and Key Points:

- The importance of creating an effective sales culture
- How to develop a sales training process
- Practical advice on empathetic selling to maximize your existing database when COVID-19 has slowed down the flow of new leads
- Lessons learned by Mike after having done over 150,000 mystery shops

Episode Summary:

In today's episode, Debbie speaks with Mike Miller, President and CEO of Primo Solutions, LLC, and the author of *Selling at Combat Speed* (2008) and *Stop Selling & Start Caring* (2011). They discuss the core message of Mike's newest book which, while always relevant, is many times more so today amid the COVID-19 pandemic.

The inspiration behind *Stop Selling & Start Caring* came when a colleague discussed the uncomfortable experience of looking for a senior living community for his mother. After visiting several communities, his colleague found that none of them even bothered to ask him how he, as the adult child, was feeling about the process. Instead, it seemed like all these communities cared about was making the transaction.

Many institutions lack a clearly-defined sales training process which, by extension, results in a lack of a cohesive sales culture. Debbie and Mike agree that it is key to have a great sales trainer that regularly conducts sessions to help instill and maintain this culture. But more importantly, the company has to have leadership in place that, once training is done, can efficiently and effectively delegate in order to ensure the healthy growth of its culture.

"You can have a great strategy," says Mike. "But if you do not have the culture in place and the buy-in where people really believe in the process and what they are doing, then it is not going to work."

COVID-19 has forced many businesses to focus on their existing database as the pandemic has led to fewer new leads coming in. Mike believes that senior living communities tend to spend too much money on incoming leads, and that many can actually fill their communities by investing in their current database. Additionally, the problem with a constant stream of leads is that communities will eventually have a difficult time to work with and nurture those leads already in the CRM.

With regards to the current situation, Mike says that we have no choice but to "make a difference on the phone." Even today, it is possible to increase your conversion rate via deliberate, creative, and empathetic selling. It starts with reducing your marketing spend and putting more focus on training your staff to work with existing leads.

Link:

Ask Mike for a free PDF of *Stop Selling & Start Caring*

Email: mike.miller@primosolutionsllc.com

[Primo Solutions, LLC](#)



Best Practices around Marketing and Communication Strategy Used by Various Industries Amid the Covid-19 Pandemic with Dan Hutson

Topics Discussed and Key Points:

- What direction should marketing and communications take amid COVID-19?
- The power of “sharing, not selling” as a long-term approach to business development
- Why your organization should shift from crisis communication to resource communication
- How to get people comfortable about potentially moving into a senior living community during a pandemic
- What can we learn from this situation, marketing and communications-wise, to become better prepared should another crisis hit?

Episode Summary:

In today’s episode, Debbie speaks with Dan Hutson, Marketing and Communications consultant. The pair discuss best practices around marketing and communication strategy used by various industries amid the COVID-19 pandemic, and how these practices can be implemented by the senior housing industry.

Today, organizations have to choose between quietly waiting out the crisis, and looking for opportunities to innovate. Much of the senior living world has chosen the former strategy. Worse than that, some even chose to do “tone-deaf” marketing that completely ignores the new normal. Consumers and clients are more forgiving towards vulnerability and more “raw” messaging, as long as the company can assure them, with a level head, that they are willing and able to consistently follow through in spite of current challenges.

“This situation has freed up your time from doing a lot of the business-as-usual marketing work,” says Dan. “Take this time to really think about interesting ways of connecting with your audience—communicating and creating ongoing conversations with them.” If more organizations adopt this paradigm, there may endure, long after the end of this crisis, a “sharing, not selling” approach to business.

It helps greatly to put yourself in the shoes of those you’re trying to serve. Imagine what a typical member of your target audience is thinking, feeling, and doing at this very moment. One thing’s for sure: there’s so much uncertainty in the world today that people in general are just looking for leaders to help make their struggles more bearable. This, says Dan, becomes the perfect opportunity to serve as your customer’s go-between—to position your company as an incredible resource which provides useful services outside the usual scope of your business.

At a time when social distancing is the norm, ask yourself how you’re adopting technology to support your sales and marketing effort. If you want more people to become comfortable with the idea of potentially moving into a senior living community, particularly during this pandemic, digital and inbound marketing should be your priorities. Many people are uninformed about the different types of available communities, not to mention their concerns about sanitation in these spaces.

If relevance is what you’re after, there’s no better time than this moment to put out regular content that tells your customers exactly what services they should be expecting from your organization. This content should illustrate the reality of your senior living space as a “living, breathing community of people who are engaged in interesting, purposeful lives.”



Widespread Effects of COVID-19 on the Senior Living Industry with Julie Podewitz

Topics Discussed and Key Points:

- Lead generation amid COVID-19
- Why warmer leads have been converting better than cold leads in the past few months
- What prospects want to talk about during the pandemic
- The power of creative follow-up
- Shifting your messaging from crisis communication to reopening
- Creating a sales and marketing playbook for the new normal

Episode Summary:

In today's episode, Debbie speaks with Julie Podewitz, Chief Sales Officer at Vitality Senior Living, on the widespread effects of COVID-19 on the senior living industry and best practices for how communities can navigate the new normal.

Asked about lead generation amid COVID-19, Julie notes that while leads have been down (more than 50% in some markets), sales conversations continue to remain strong—and in certain cases are actually higher than pre-COVID-19 numbers. A big factor is sense of urgency which, according to Julie, has been “moved forward in a massive direction”. Empathetic sales has become the norm. The pandemic has “forced us to be doing what we really should be doing, which is asking questions” as well as demonstrated the importance of building rapport using every available channel. While leads have lessened, phone calls have been longer and more meaningful. During these challenging times, busyness has morphed into productivity.

Even if prospects may not be able to move into a community anytime soon, there is no better time to connect with them than right now. Potential residents are looking not only for a resource, but for an ear as well. While leads across the board have been down, referral leads have been on the rise, which says more than anything else that prospects are looking for people that they can entrust their future to. By connecting with and creatively following-up with these prospects, getting sales is a given.

No matter the current climate, what needs to remain consistent in your brand's messaging is honesty and transparency. Of course, this is especially true amid the pandemic, during which fear is the biggest shared hurdle that senior living communities must overcome in the minds of their prospects and current residents. By being upfront with your intentions in your communications, you will assure and inspire confidence in both your employees and customers.

Links:

www.vitalityseniorliving.com



Painting a Picture of the Future of Senior Living with Carlene Motto

Topics Discussed and Key Points:

- How the employees and residents of Belmont Village have weathered COVID-19
- What has changed and what continues to work in the industry?
- Building trust with a captive audience
- The senior living industry should begin to tailor their messaging around reopening
- Dealing with misleading and negative media coverage
- Adapting your messaging and value proposition during a period filled with uncertainty
- Becoming more prepared in the case of a second wave

Episode Summary:

In today's episode, Debbie speaks with Carlene Motto, Chief Marketing Officer at Belmont Village Senior Living. The two discuss how COVID-19 has completely shaken the industry and drastically affected the lives of residents and the employees who care for them. After reflecting on lessons learned throughout this ongoing ordeal, Debbie and Carlene paint a picture of the future of senior living.

One of the biggest changes in the industry was making the switch from face-to-face to virtual with regard to connecting with potential residents. Prior to COVID-19, marketing "had to be creative" since most prospects and their families did not normally pick up the phone. Sales teams had to make use of texting, email, and other forms of written communication. Now, the tables have turned and people look forward to speaking with others. Aside from the phone, technologies such as Facetime and Zoom have become incredibly important for connecting and building trust and rapport with prospects and their families.

Belmont Village believes that "our opportunity is to tell our story through our website." Due to the pandemic, efforts have been put into repositioning the brand to demonstrate real concern for their people. Out of respect for families who may be struggling financially at this time, focus has been put on connecting live with the families, providing meals to the community, and doubling down on blogging and other website-related strategies.

At a time when the media tends to conflate senior living with nursing homes and at times highlight negative stories regarding the industry, communities need to optimize their messaging on their website and do whatever they can to build relationships with residents, prospects, and their families. "I absolutely believe that senior living even during these dark times is the right place to be—where you can still have interaction, good nutrition and healthcare, and access to PPE." Sales and marketing teams should continue to keep in mind that building trust in these turbulent times requires "timely, frequent, and transparent communication" with customers.

Both employees and customers want and expect regular and reliable communication during times of uncertainty. In the case of a second wave of the virus, one of the best things that a company can do to prepare is to learn to be alert and responsive at a moment's notice. As Carlene says, "There's no such thing as overcommunicating during a time like this. [...] In real estate, it is location, location, location. In senior living, it is people, people, people."

Links:

www.belmontvillage.com





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