



# You've Got the Leads – Now What?

## *Solving the Occubancy Puzzle*



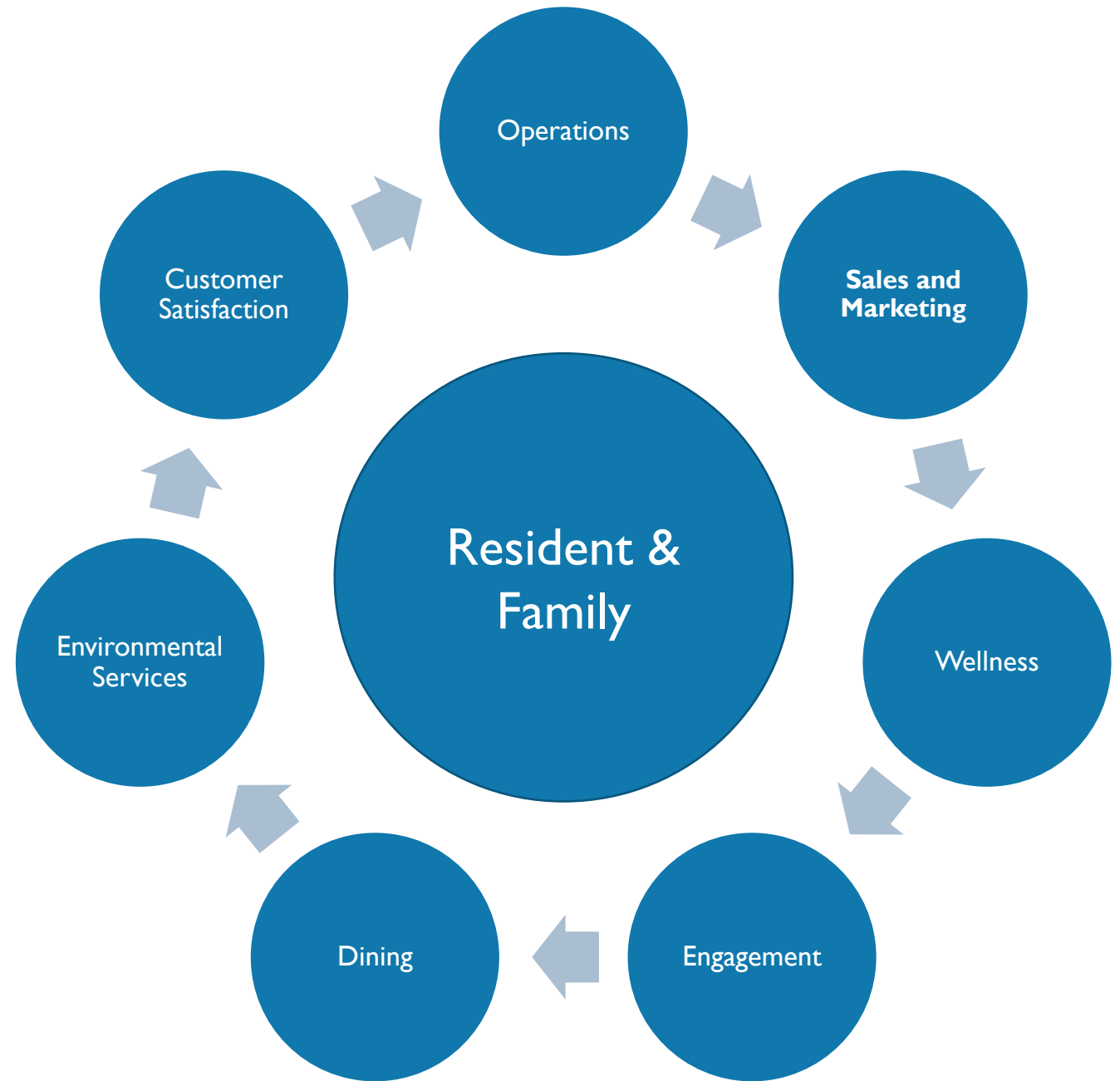
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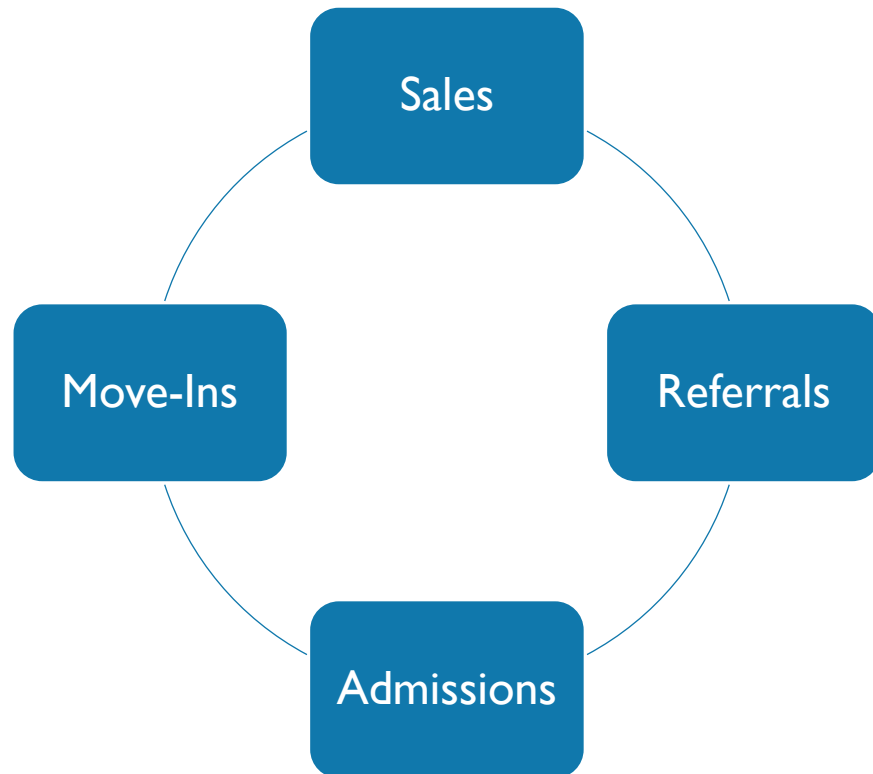
Revenue-  
Generating

Operations  
Culture



# What is a Marketing Director's responsibility?

## Generate Revenue



## NOT

- Serving in dining room
- Budget meetings
- Housekeeping
- Hanging out with residents



# We Need **More** Leads

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- Typically, the first sales metric discussed.
  - Most widely understood.
  - More leads must mean more move ins, right?
  - More **unqualified** leads does not help.
- 
- Is this the “solve?”



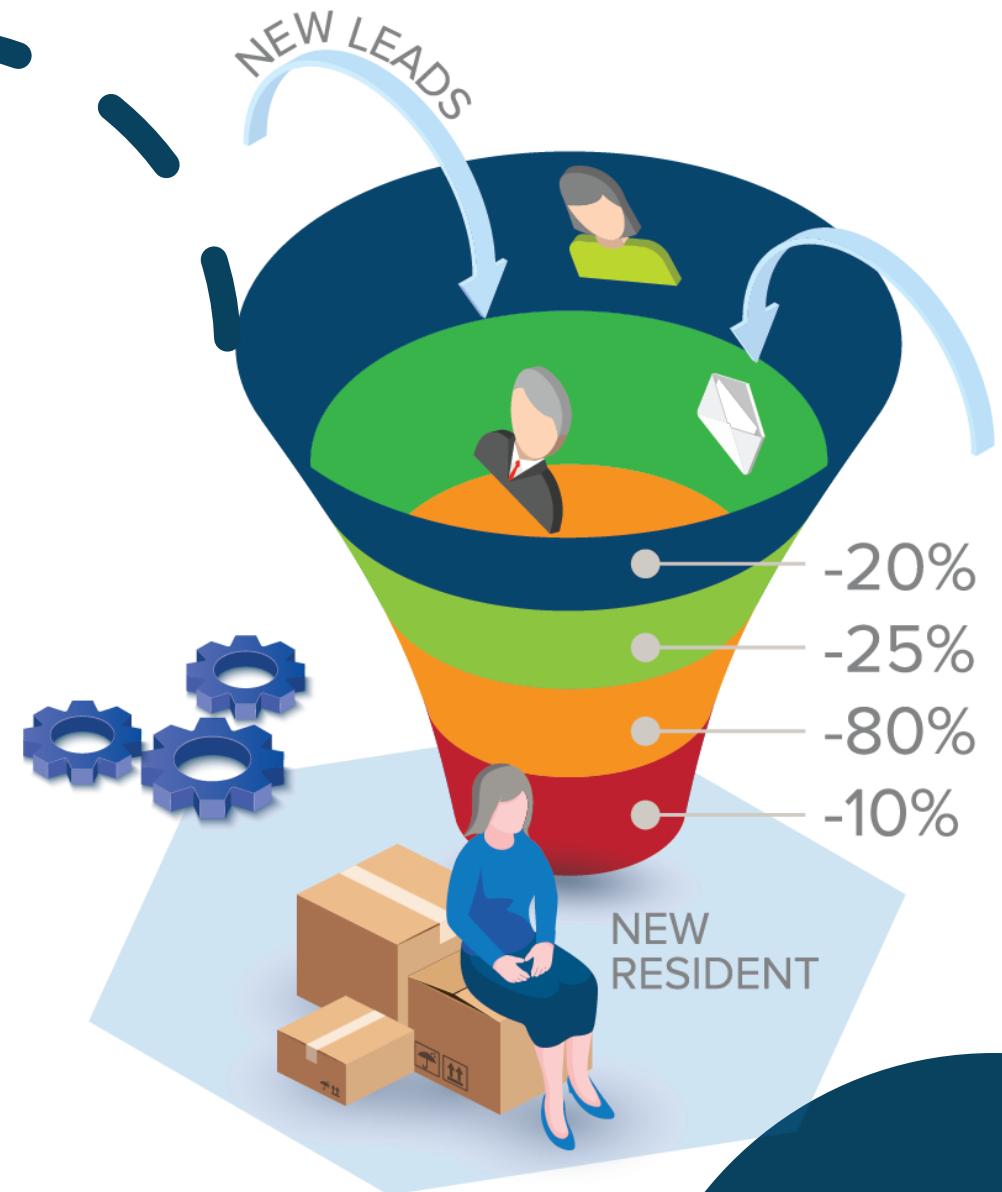
# First, confirm this is true

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- **Many have enough leads – in volume**
- **If you don't:**
  - Outreach to fill pipeline with referred prospects
  - Digital Marketing Strategy and Results
  - Track results
  - Lead Source Analysis
    - Conversion Metric to Tour and Move-In

# The Sales Funnel

- New Leads/Referrals Go Into the **Top** of the Funnel
- Move-Ins/Admissions come out of the bottom
- The in-between is the sales process, the customer decision-making experience.
- Prospects “fall out” of the funnel at every stage.
- MOST (85-90%) get **STUCK** in the funnel.
- Adding more leads to the top without addressing the “middle” just adds to the problem.



# How many of your leads are “Stuck in the Middle”

Adding more leads to the top without  
addressing the “middle” just adds to the  
problem.

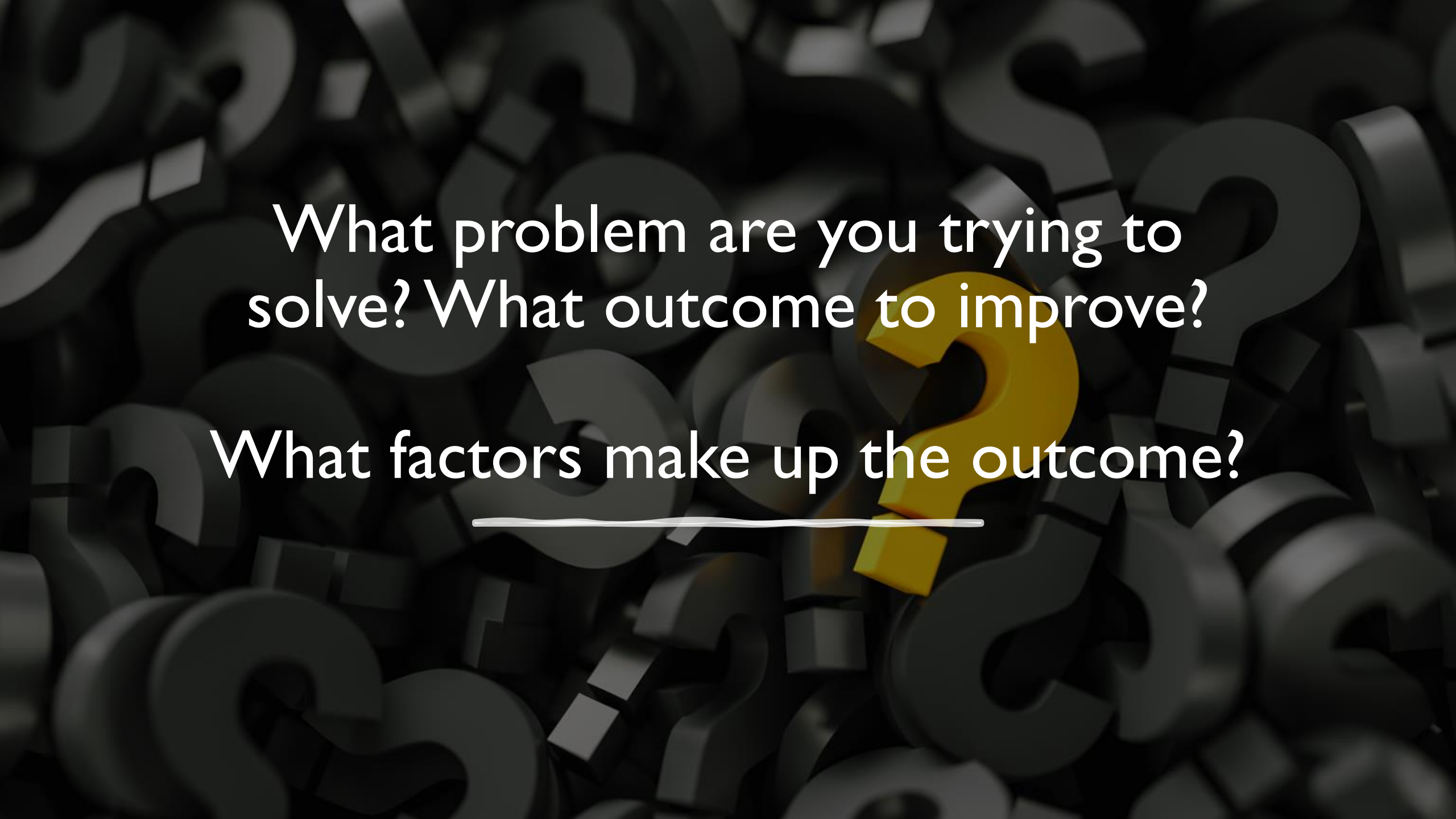


# Sales Impact

- This is where the impact of SALES (and sales, marketing director/sales leadership) comes into play.
- Increasing by 5 basis points would mean more prospects than units.







What problem are you trying to solve? What outcome to improve?

What factors make up the outcome?

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# Two Measurements

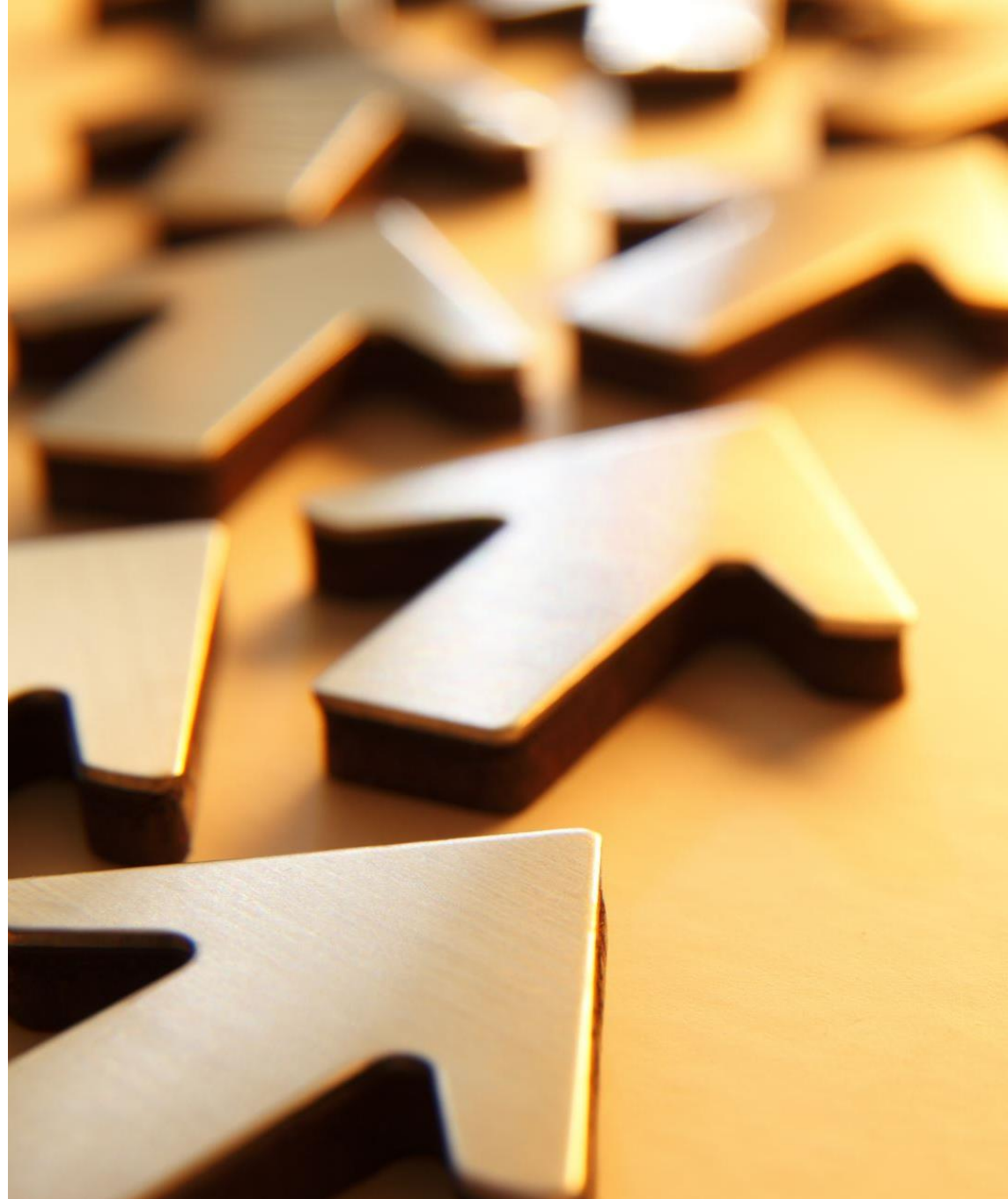


**Activity**  
**What is done**

**Conversions**  
**How well**  
**it's done**

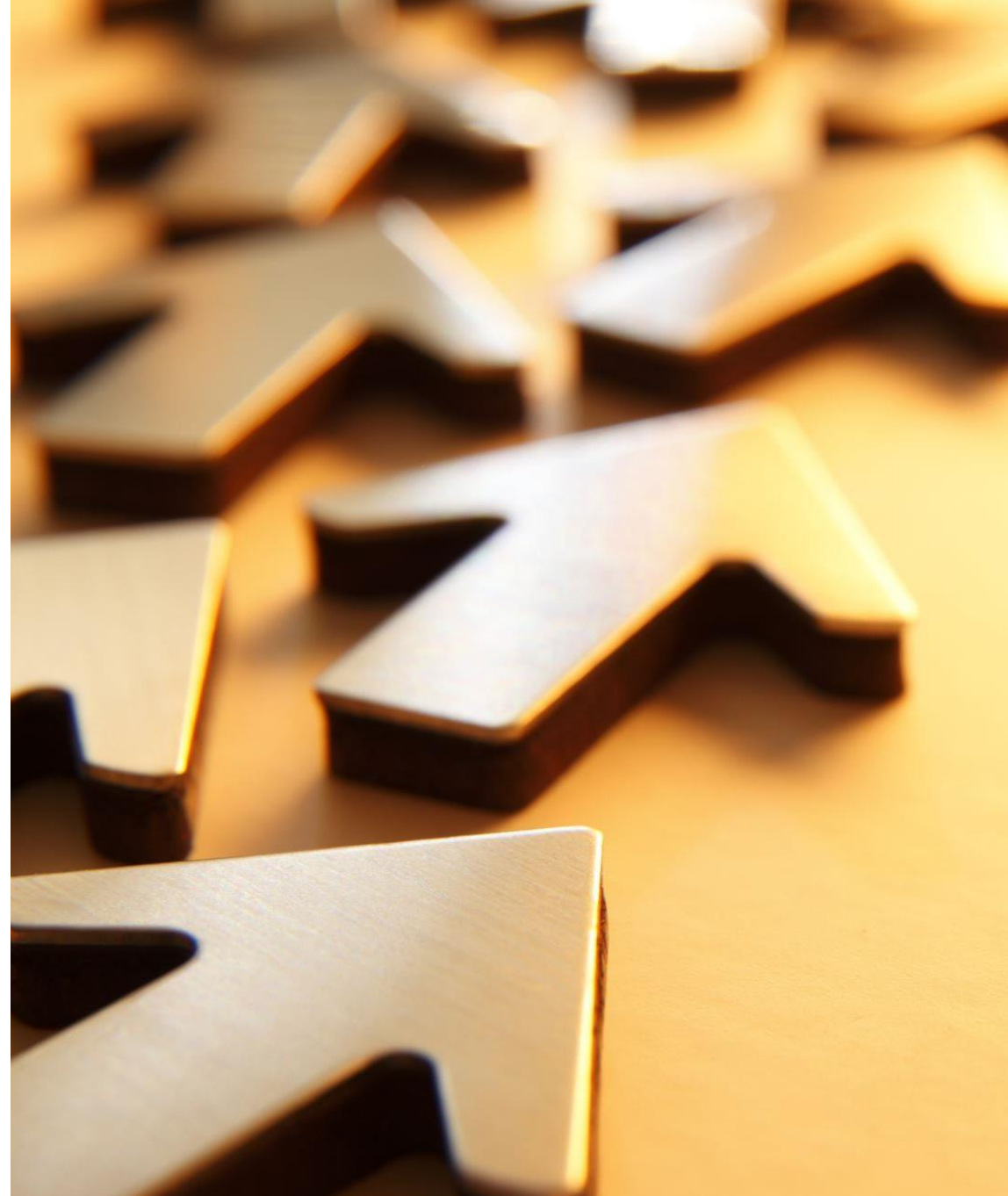
# Activity

- **Identify most impactful actions**
- **Community tours**, phone calls/connections with customers, outreach appointments and referral source calls, receiving referrals



# Least Impactful

- **Emails**
- **Events focused more on residents than prospects**
- **Networking without purpose**



More more more!

Volume and Velocity

— *Just Say No*

Sending lots of email

Calling to check in

Calling to see if someone is ready or has questions or if they received the brochure

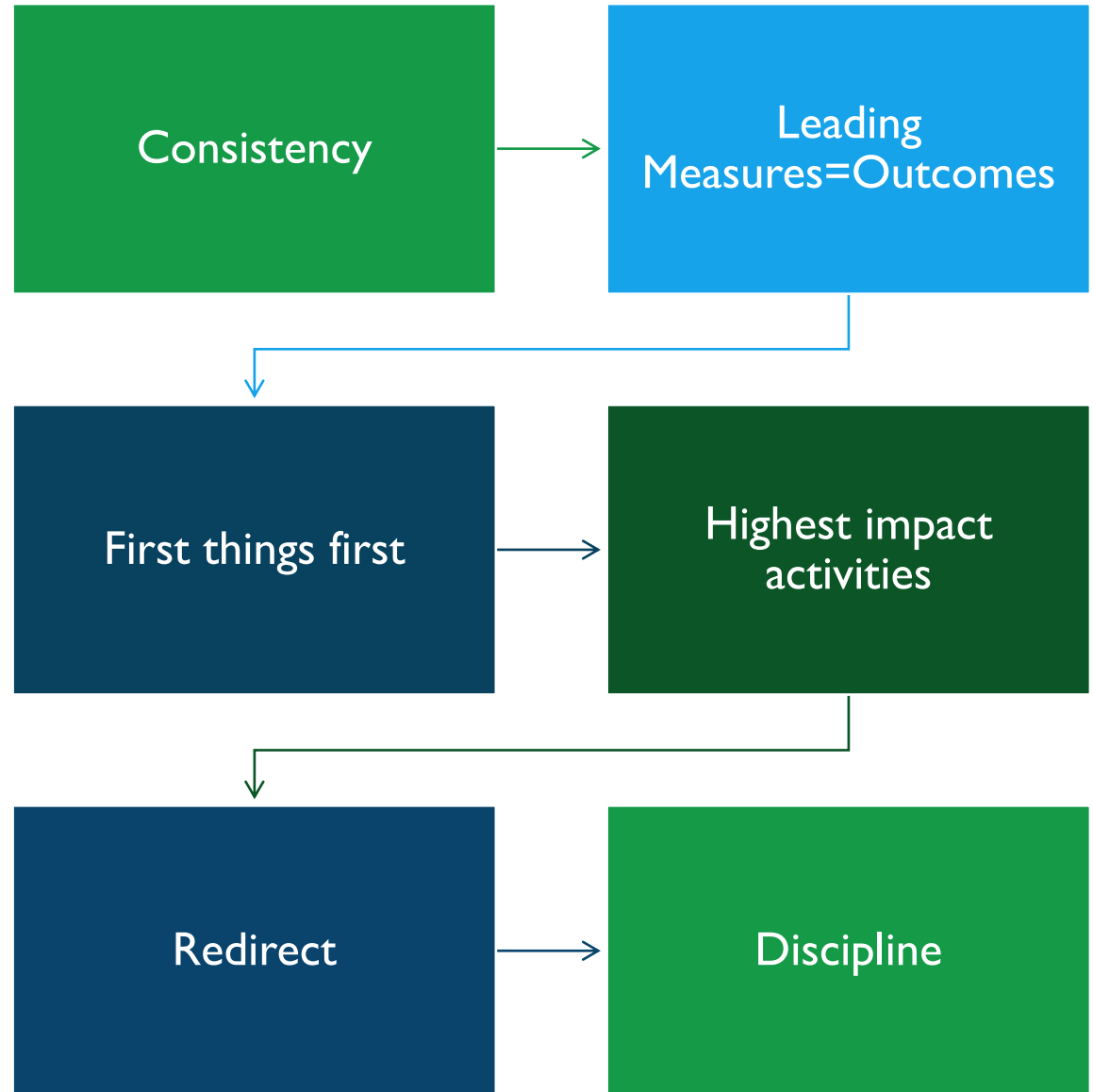
Mailing materials

Trying once and “forgetting” them because they aren’t hot

Dropping off flyers

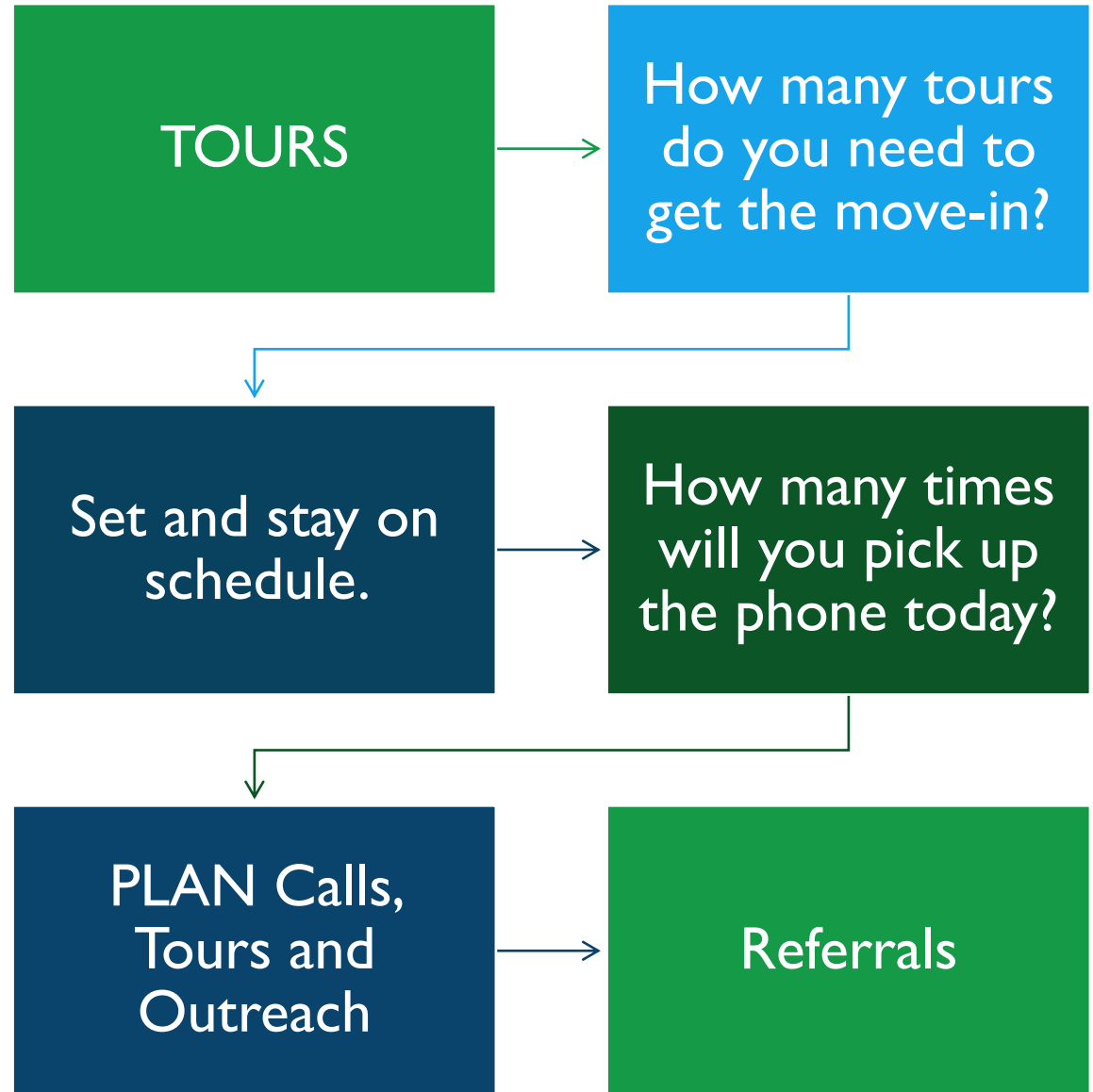
# Sales and Marketing Activity

*Just Get Started*



# Sales Activity Strategy

*Just Say YES*





# “Strategic” Marketing

DESIGN

ARCH



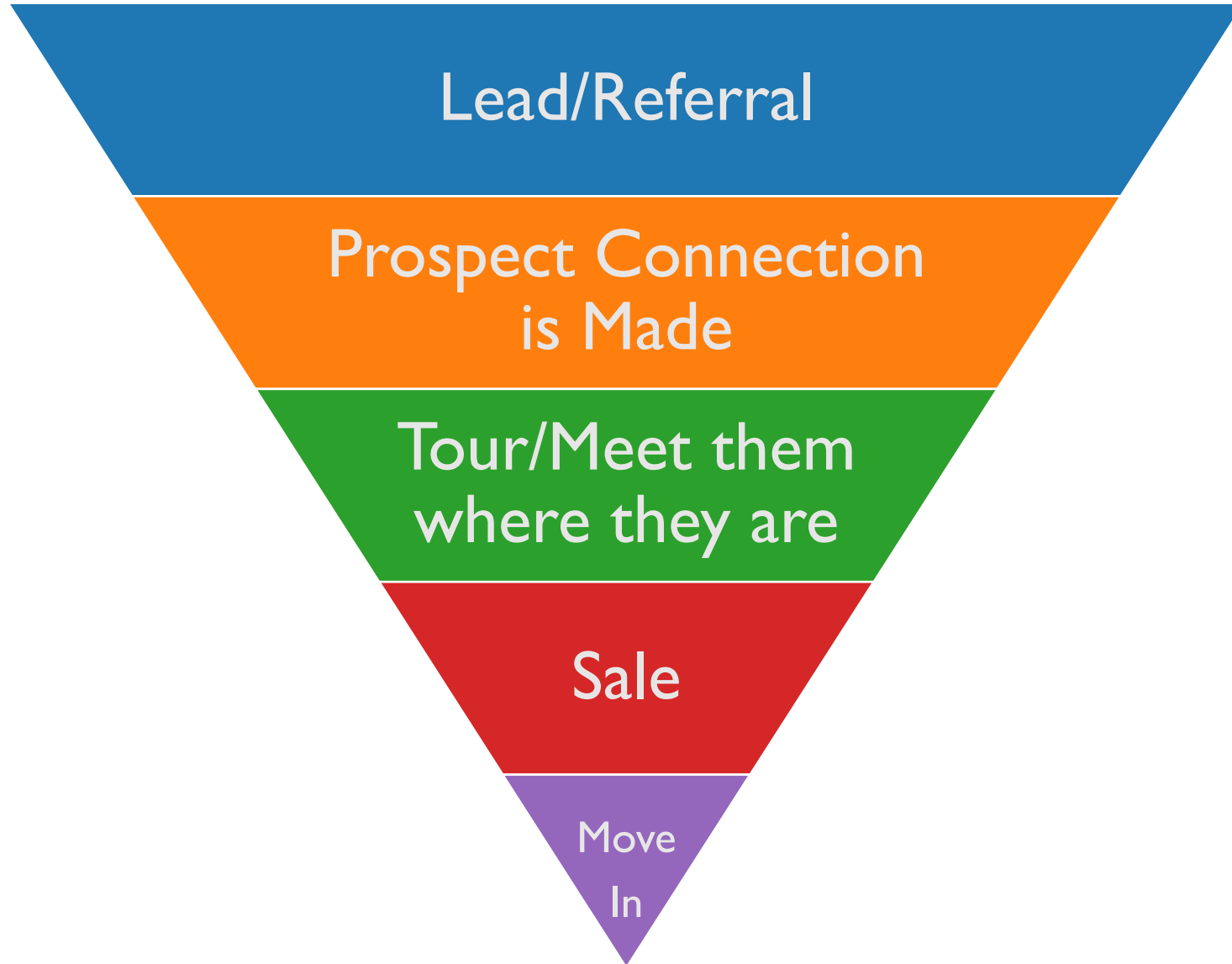
# 1<sup>st</sup>, Know Your Business

Know what problem you're trying to solve and what factors make up the outcome

Don't "knee-jerk" response or analysis based-on emotion

Once or twice is not a trend

# The Sales Funnel



# Solving Occupancy Puzzle – Not Enough Tours (Referrals)

1. Lead Source Analysis  
(Lead Quality)

2. Lead to Connect  
Ratio

3. Discovery (Skill)

## Conversion Metric #1

Lead to Connect

First, begin measuring  
if not currently

Quick Initial  
Response

What % of all leads  
are connected?

## Conversion Metric #1

Lead to Connect

Cadence for continued attempts

Who is on deck – develop 3 first responders

7 days/week – need back up for “off” hours

## Conversion Metric #1

Lead to Connect

Consider a Virtual Sales Specialist,  
Establishing In-Take System

Multi-media approach – must stay on top  
of cadence to connect

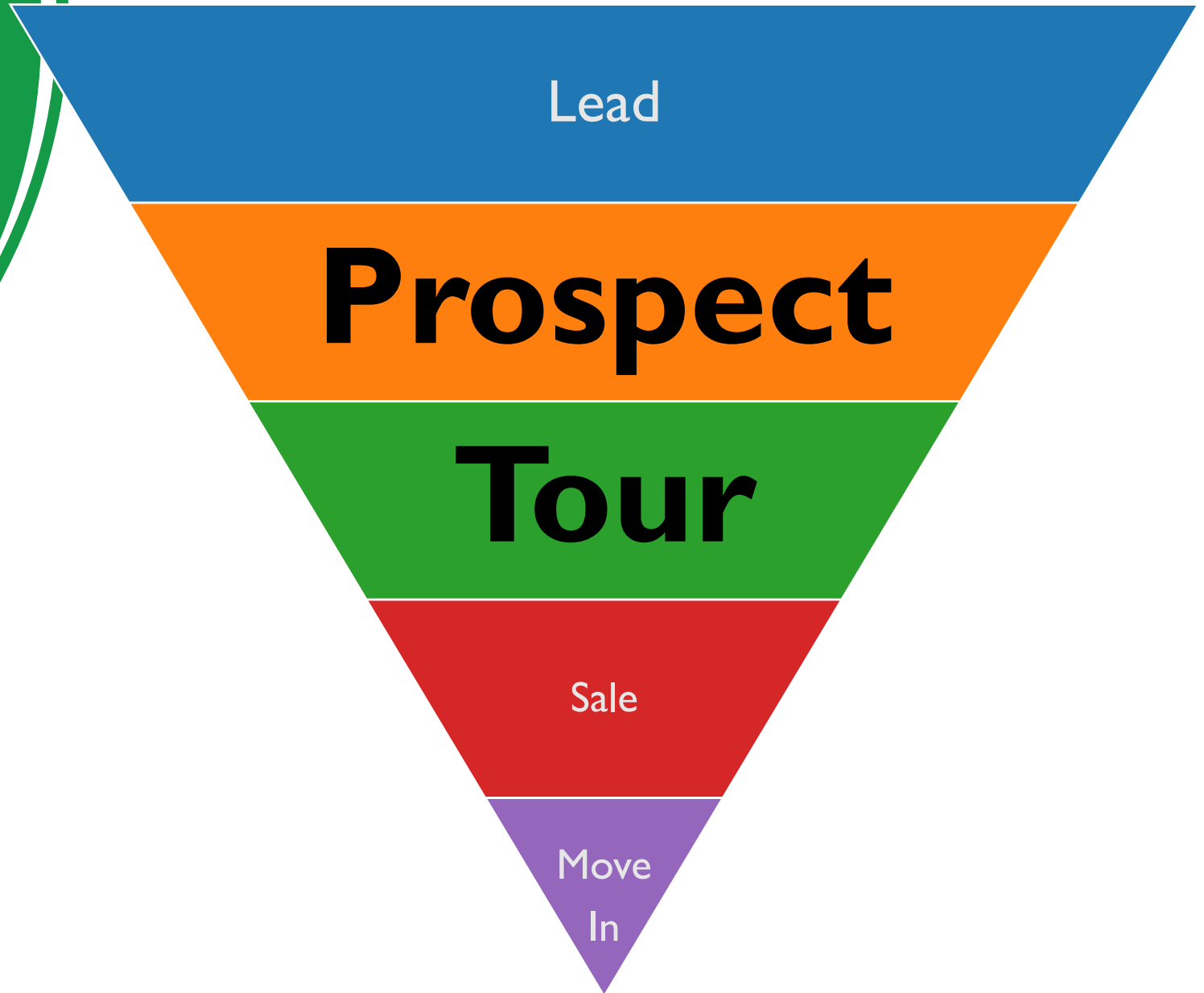
Concierge Front Desk Training

Accountability for initial connection –  
Benchmark Lead to Connect (80%-90%)

## Conversion Metric #2

### Prospect (Referral) to Tour

% of Prospects Who Come in  
for a Tour – or agree to  
Home Visit



# Conversion Metric 2

## *Prospect to Tour*

Measure metric

Establish benchmark

Develop discovery process and  
expectation

Practice closing to next step-  
TOUR



# Don't Rush – Don't Assume



Discovery – Learn  
about your  
customer



Ask more than you  
tell



Open ended  
questions



Pause



Ask more



Learn their STORY

*Prospect to Tour*

*How to Improve*

Simple Discovery Training

Develop listening skills

Personalize conversation

Practice to build confidence and skill

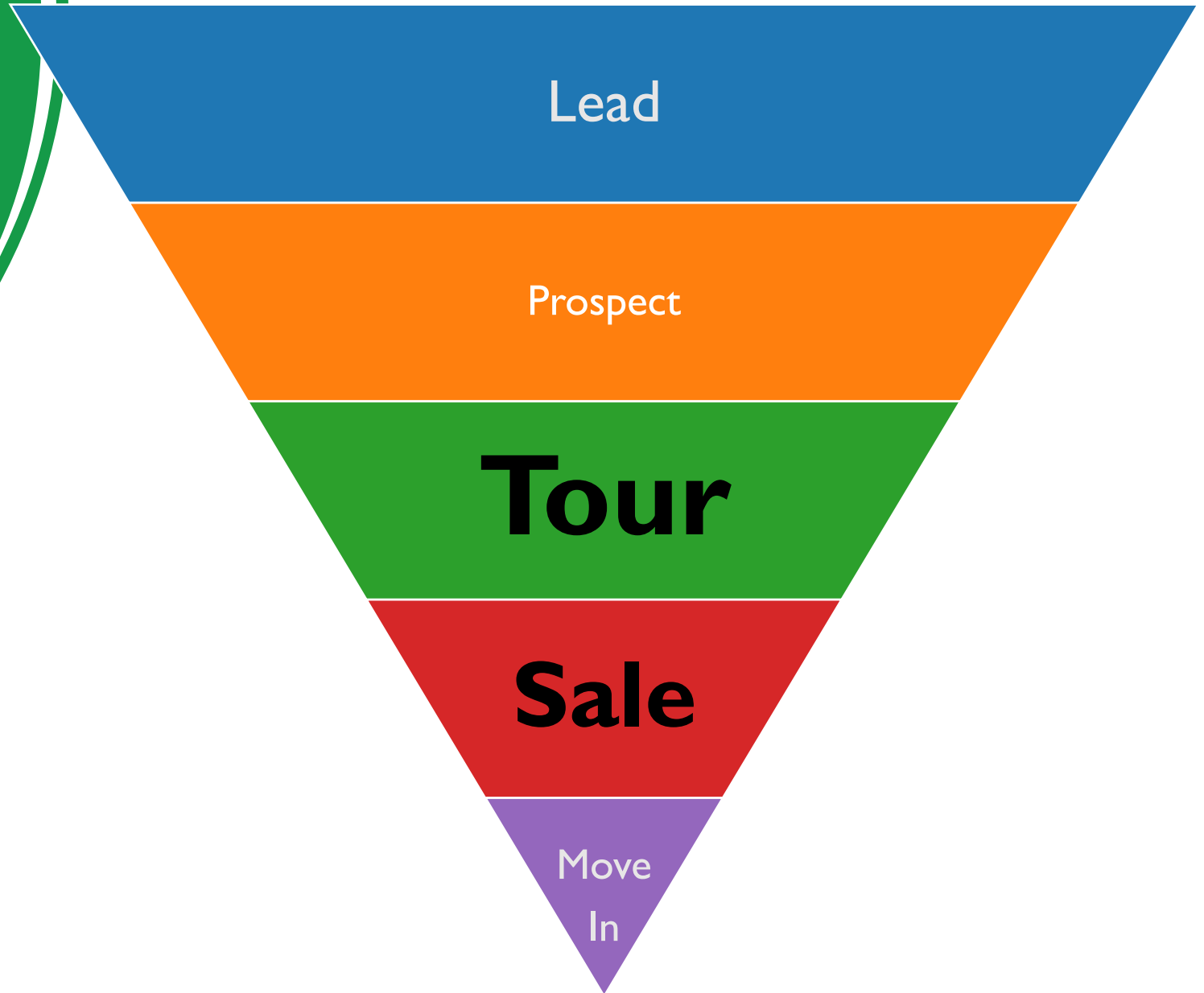
Confidence to schedule tour

State with confidence

## Conversion Metric #3

### Tour to Sale

% of Post-Tour Prospects  
Who Deposit



# Conversion Metric #3

## Tour to Sale

Strengthen the  
EMOTIONAL  
Connection

Visit before  
the “tour”  
portion

Develop  
listening skills



**Personalize and plan the tour**



# Tour to Sale

## How to improve

Engage the Team

People remember  
how they FELT  
over what they  
learned

Do not assume –  
ask and recap

# Making Impact

# Tour to Sale

Model room  
ready

Music playing

What are your  
residents  
doing?

Beverage/Snack

Tour to Sale (next  
step)

How to improve

WOW Factor

Who did they  
meet?

Community feels  
vibrant – what is  
happening?



# Closing

Recap

Give Advice – Next Step

Customer Agreement

Confirm

A man and a woman are seated at a table, looking at a document. The man is wearing a light blue button-down shirt and has a goatee. The woman is wearing a light-colored cardigan, glasses, and has her hair pulled back. A third person, seen from the back, is wearing a dark suit jacket. The background shows a window with light coming through. The text is overlaid in white on the image.

Keep it simple.  
Sit down in model or discovery area after  
touring.  
Your customer's next step.

# Tour to Sale

Close **before** they leave

Keep it simple – what is next?

What does it sound like to you?

It's the customer's next step

*What they need to do, decide, consider*

*Give advice – be confident*

# Give Advice AFTER Listening to Them

Importance of  
being strong  
advisor

Help clear the  
maze

Confirm it  
makes sense.

**Why is this so  
important?**



# Overwhelmed customers

Cannot make a decision

Will stay in state of “flux”

I just can't deal with this right now.

Give me more time.



# During Decision Process

Practice empathy

Recognize weight of this decision

Acknowledgement

Feel Seen and Heard



# Follow Up

Multi-Media – use technology

Establish and track follow up activity benchmarks

Follow Up Toolbox

Engage team

Home Visits – include in follow up







- Engage customers where they feel most comfortable
- See first-hand what they are “giving up”
- “Why are you considering making this change?”

Home (or Hospital) Visits

# Follow Up Calls

Start where you ended

Open with statement of fact

*You toured with me two days ago*

*You were researching options*

*You were going to speak with your mom.*

# Common Mishaps

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Waiting too long post tour

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Relying on email communication

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Huge gaps between follow up

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Not securing customer next step

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Allowing tasks to go past due

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# Metric #4

## Outreach = Referrals

Plan appointments

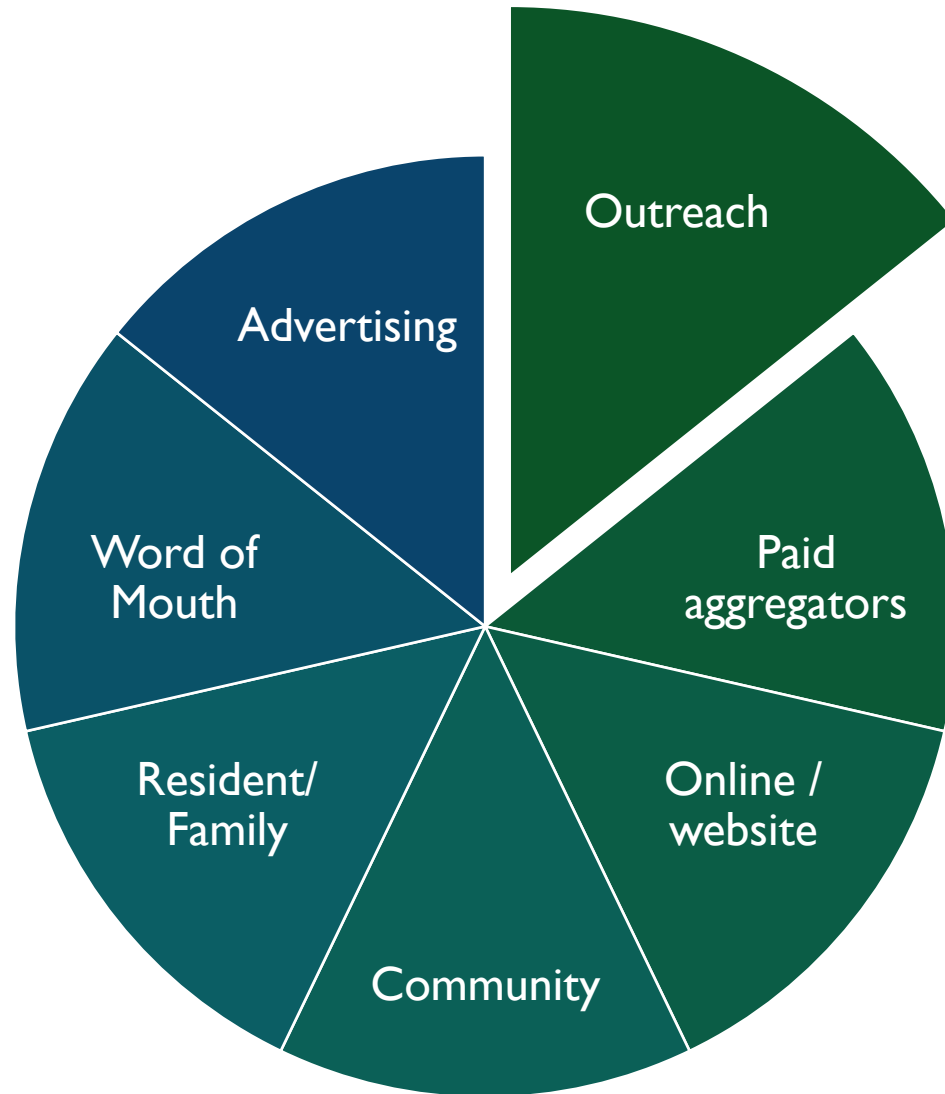
What is objective of visit? What do you want to know?

Discovery – what is important to them?

Follow Up, Follow Through

Track appointments, track referrals received.

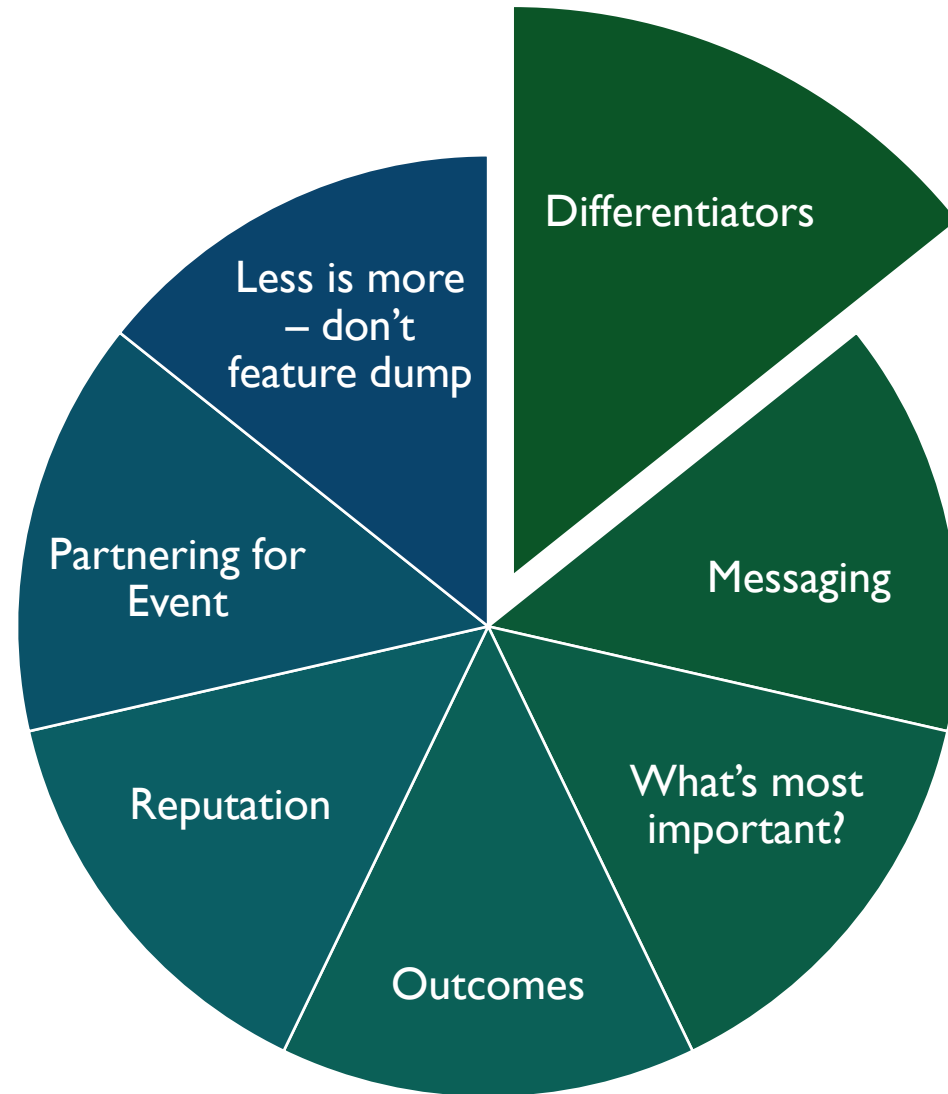
Watch trends for word of mouth



## Outreach = Referrals

What do you want to know?

What would you like them to remember?





# Know Your Metrics, Know Your Business

- Your metrics tells a story.
- You'll work more efficiency with a roadmap.
- Do not “knee jerk” based on emotion or the last conversation or 1 or 2 experiences.
- Give it 90 days, whatever the change

# Recap

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There are factors that play a part in every stage of sales and marketing process.

Identify the factors (Puzzle pieces of occupancy puzzle)

Sales Conversions – take time to practice skills

Outreach is sales – track outcomes



# Recap

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Build empathy by practicing listening skills.

Meet customer where they are, continuing advising to their next step.

Take time on the discovery – and continuing discovering. For potential resident AND referrer

Measure Progress

Take time to recognize your wins.





**Questions  
Discussion**

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RECAP



**Thank You.**

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