



SMASH 2023

SENIOR CARE MARKETING & SALES SUMMIT

October 16–18, 2023
Las Vegas, NV

Building a Modern Sales Organization

What Matters Most and How to Make the Shift

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Partner and COO, SalesGlobe

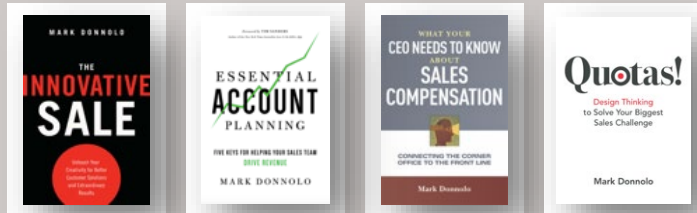
We Help Companies Grow Revenue By Solving Sales Challenges

We are rethinking sales.

We work with you to design and implement solutions that drive revenue growth.

Our focus is on solving sales challenges with practical solutions that you can operationalize to achieve results.

BOOKS BY SALES GLOBE



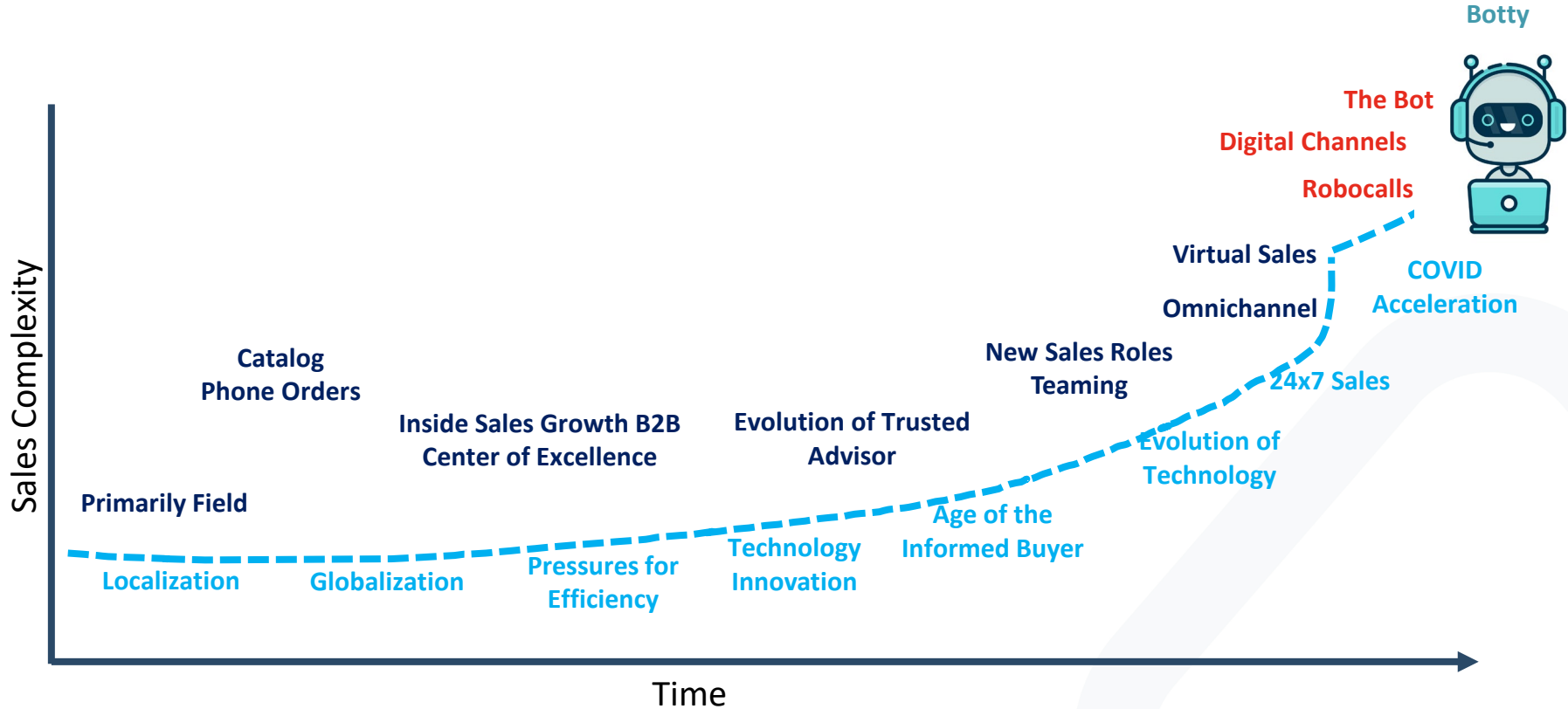
Our Focus Areas

- ▶ **SALES INSIGHT**
 - Competitive Benchmarking
- ▶ **SALES STRATEGY**
 - Sales Strategy
 - Go-to-Market
 - Account Segmentation
- ▶ **MARKET COVERAGE**
 - Sales Organization Design
 - Sales Capacity
 - Sales Process Optimization
 - Strategic Account Programs
- ▶ **SALES ENABLEMENT**
 - Sales Incentive Compensation
 - Quota Setting
 - Digital Sales Transformation
 - Sales Leadership Placement

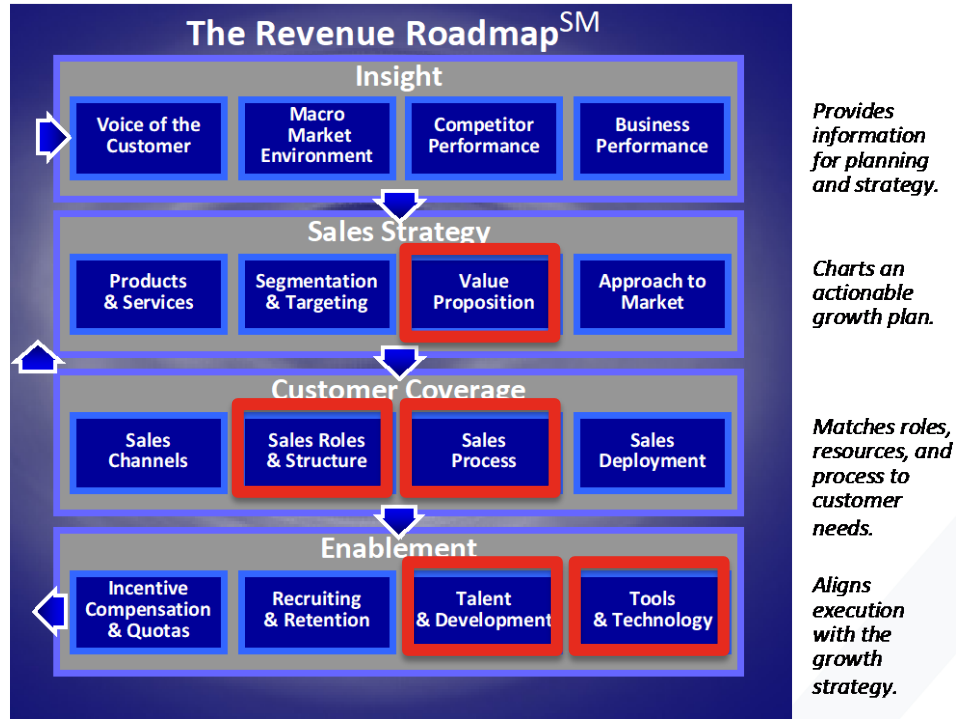


SALES GLOBE

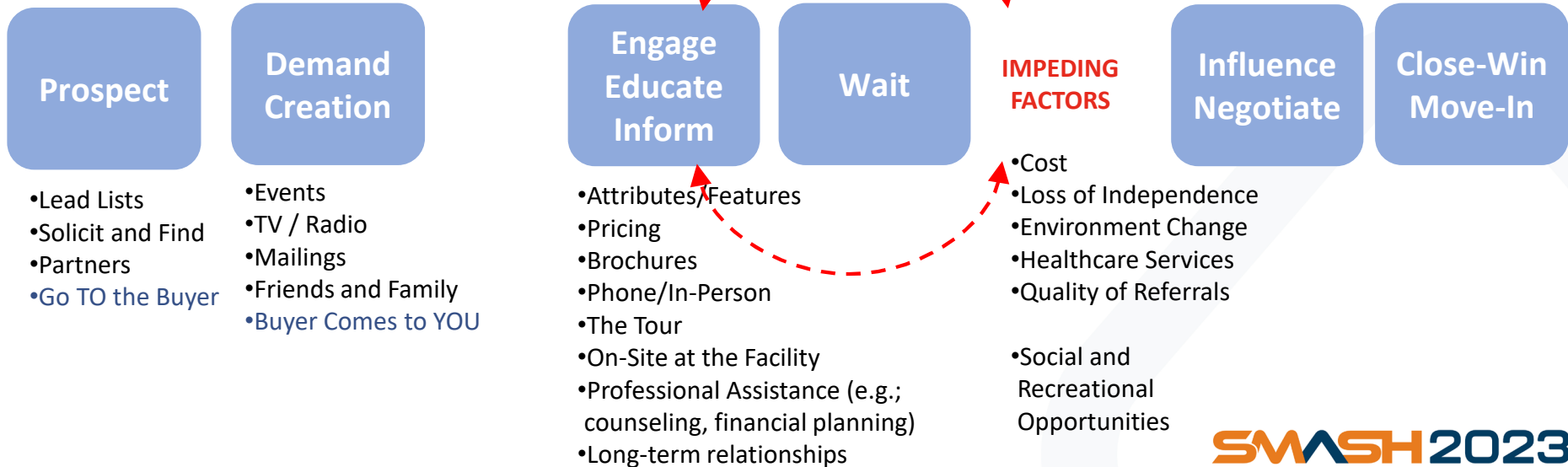
The Evolving Sales Landscape



A Strategic View on Sales



Today's Sales Process Has Become Yesterday's News



Attributes of a Modern Salesperson



Digital Savviness
On-Line Presence



Social Proof
Reviews

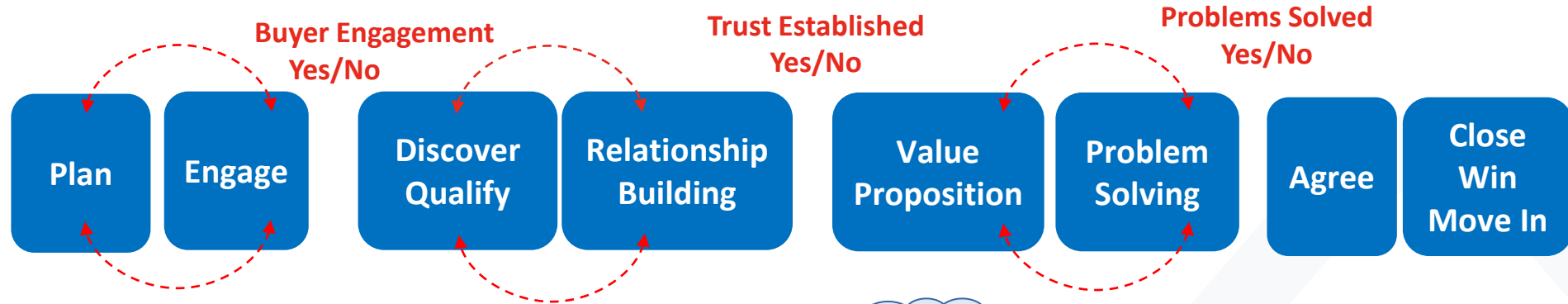


The Sales Director Overload



Sales Process Evolution

Engage • Trust • Solve



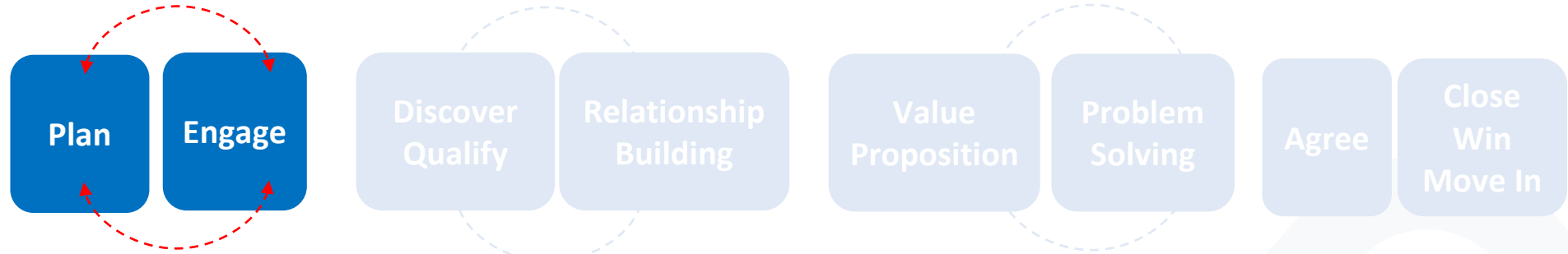
Do I believe and trust?





Sales Process Evolution What Must Change?

Engage • Trust • Solve



•Target Market Demographics

•Referrals and Testimonials

•Social Presence

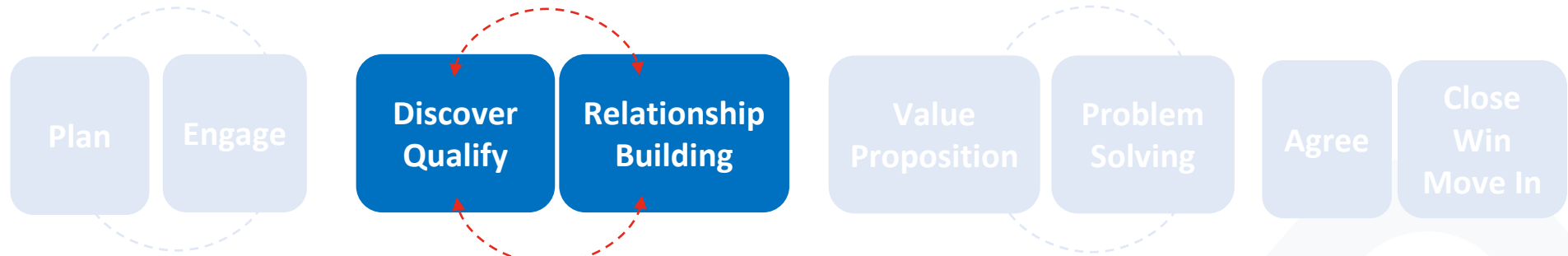
•Community Presence

•Thought Leadership



Sales Process Evolution What Must Change?

Engage • Trust • Solve

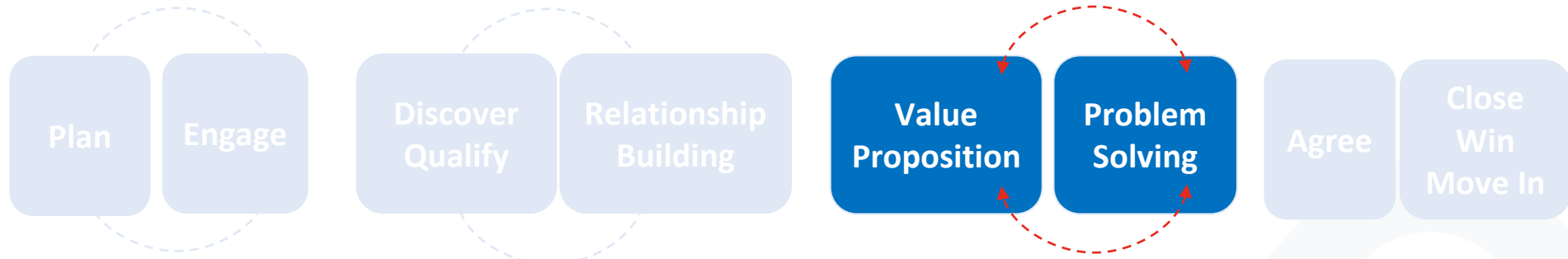


- Having a Discovery Conversation
- Understand Their Story
- Referrals and Testimonials
- Responsive and Accessible



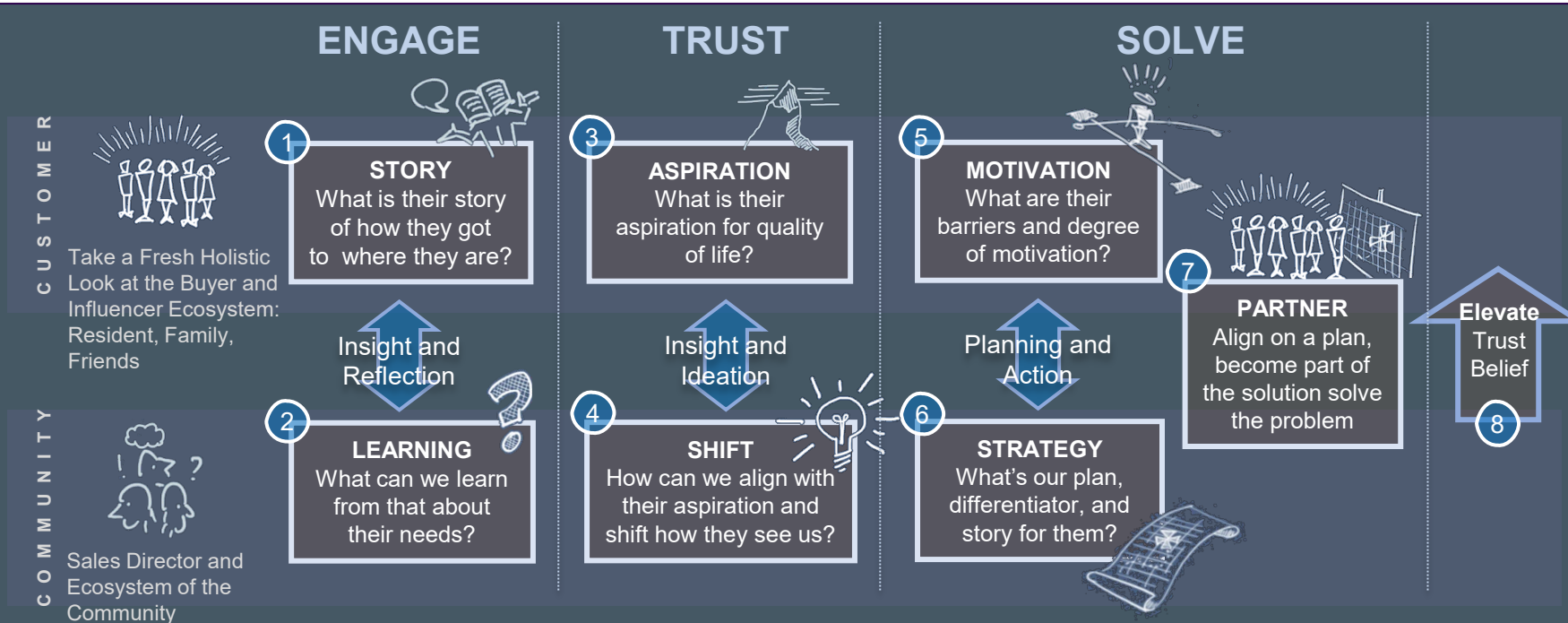
Sales Process Evolution What Must Change?

Engage • Trust • Solve



- Top Concerns and Issues of the Buyer Ecosystem
- Resident Concern Focus
- Testimonials
- Story Telling

The Aspirational Partnering Method- Engage, Trust, Solve



Breaking Down the Story

ENGAGE

CUSTOMER



For the Future Resident and Ecosystem of Family and Friends

1

STORY

What is their story of how they got to where they are?

Insight and Reflection

2

LEARNING

What can we learn from that about their needs?

COMMUNITY



Sales Director and Community Ecosystem

For the Potential Resident What is their current state?

- How did they get here?
- Who was involved?
- Why are they exploring senior living?

For the Ecosystem: Adult Daughter, Children, Family & Friends, Physician, Caretaker

- What is their current state?
- How are they involved?
- What do they observe about the potential resident?

Reflecting on their stories...

- What does each story reveal about past experiences, preferences, priorities, and concerns?
- How do the stories of the potential resident and ecosystem come together?
- What has enabled them or held them back from where they want to go?
- What do we know now, that we didn't before, that can inform our approach?

Using Insight to Design a Better Solution

CUSTOMER



For the Future Resident and Ecosystem of Family and Friends

COMMUNITY



For the salesperson and our community

TRUST

3



ASPIRATION

What is their aspiration for quality of life?



Insight and Ideation

4

SHIFT

How can we align with their aspiration and shift how they see us?



- If there were no barriers or constraints, what defines living their best life? What is their definition of quality of life?
- How does this fit into their current physical and mental condition?
- What aspirations do they have and how does our community align to that?
- How can we adapt to their aspirations? What solutions can we develop and how will that change our model?
- What concerns or challenges do they have with their aspirations?
- What do they think about as they consider 3-5 years into the future?
- How can we shift the customer's paradigm about how they see us?
- Are the adaptations we make to align with our customer's aspirations something we can guarantee?
- How does our solution test with the potential resident and key stakeholders?

Taking Action – Building the Solution

CUSTOMER



For the Future Resident and Ecosystem of Family and Friends

- What are their near-term goals and challenges?
- What is the degree of motivation to change?
- What is the impact and influence of the ecosystem of family and friends?

COMMUNITY



Sales Director and Community Ecosystem

- How can we address their near-term goals and barriers?
- Can we meet their aspirations?
- Can we address their barriers with something we can guarantee?
- Have we addressed the most significant barriers, issues or concerns?

SOLVE



5

MOTIVATION

What are their barriers and degree of motivation?

Planning and Action

6

STRATEGY

What's our plan, differentiator, and story for them?

- Have we co-developed a solution with the future resident?
- What is our final solution that we can guarantee?
- How can we tell our story to capture their commitment?

Closing the Deal

SOLVE

CUSTOMER



For the Future Resident and Ecosystem of Family and Friends

COMMUNITY



Sales Director and Community Ecosystem

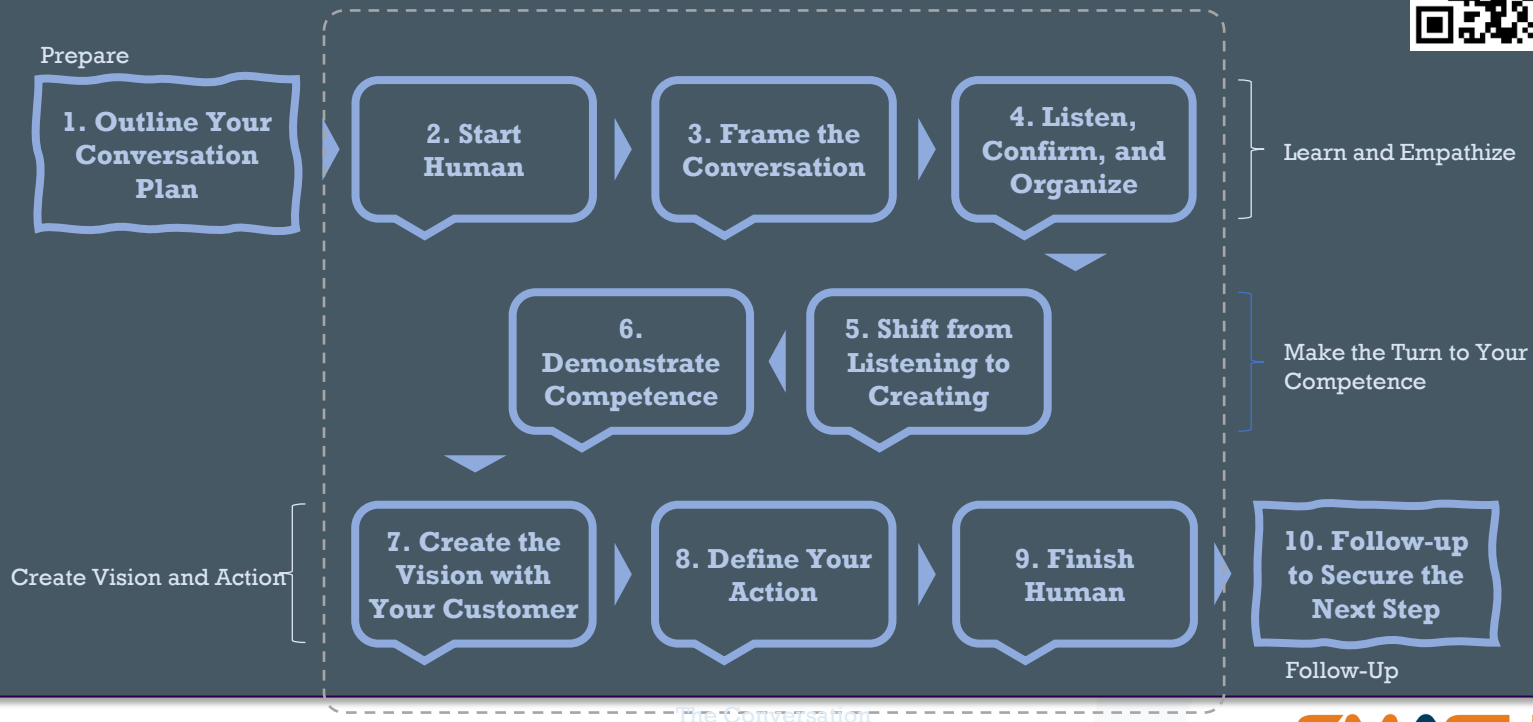
7



PARTNER
Align on the plan, measure, and achieve success!

- How can we communicate and finalize the plan that engages the customer?
- How can we establish level of service and commitment review points internally and with the resident as we prepare for the move-in?
- How can we operate, measure, and demonstrate we are keeping our promises with the resident and ecosystem of family and friends?

The Sales Discovery Conversation



Shifting Key Performance Indicators Prospecting Metrics

Leading Indicators

- Number of Leads
- Lead Response Time
- Lead Conversion Rate
- Number of Calls Made
- Number of Emails Sent
- Events Attended
- Sales Pipeline Size



KPI

Quality Matters

- Lead Quality
- Call and Email Quality
- Number of Referrals Received
- Event Type and Quality – are you reaching your Future Resident and Family?

Shifting Key Performance Indicators Sales Activity Metrics

Leading Indicators

- Number of Tours
- Number of meetings scheduled
- Number of follow-up contact points



Quality and Probability

- Quality of the Tour
- Net Promoter Score
- Engagement of Residents in the Process
- Testimonials and Stories



Shifting Key Performance Indicators

Outcomes

- Revenue
- Occupancy Rates
- Number of Move-Ins
- Satisfaction Scores
- Resident Retention
- Resident Engagement
- Testimonials
- Stories
- Reviews
- Referrals





Bringing it All Together



Our Story – Solving Your Greatest Sales Challenges



🔗 Rethink Sales Podcast

🔗 Riding the Big Wheel Podcast
(Spotify, Apple)

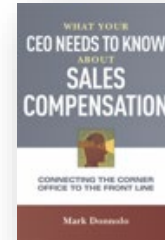
🔗 Get the books for great practices
(Amazon)

🔗 Talk with us for advice and action
(SalesGlobe.com/contact-us)



**Engage - Trust - Solve
Assessment**

Unlock Exclusive Insights
with SalesGlobe



Engage Trust Solve (ETS) Virtual Workshop

Included

2 Session Workshop and Action Plan

- ✓ **Specific to your sales challenges**
 - **Applies ETS to your team's situations**
 - **Learn Sales Discovery Conversation method**
 - **Understand the customer's story**
 - **Create aspiration with the customer**
 - **Make the shift to position your organization**
 - **Align on a common vision**
- ✓ **Sales effectiveness action plan for your team**

Outcomes

Differentiate from the Competition and Increase Your Win Rates

Scan the QR Code

