



Ask Alex

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SECTION 1

Building A Team of Sales Heroes

Sales Hero Manifesto

I am a Prospect-centered Sales® Person.

I believe in the life enhancing opportunities that our product provides. I am knowledgeable about my product and the industry. I strive to become knowledgeable about the **prospect**.

I recognize **prospects as persons** with all the rich history, complexities, quirks, interests, desires, hopes, and fears of any person. I honor that complexity.

My job is to guide the prospect toward a decision to buy/change.

My job is to build a trusting, professional relationship with the prospect. That relationship is built by planning, by listening, by going to where the prospect is, physically and emotionally; and by creatively following-up.

My success is measured by my ability to help the prospect go from **"I'm not ready"** to **"I wish I had moved sooner."**

My success is measured by my ability to **advance the prospect toward a decision to buy/change**.

I understand that every prospect is facing a life changing transition, and that **ambivalence and resistance are common and real**. I don't give up when I meet resistance or rejection.

I understand that prospects are **looking for guidance**, trust and a safe place to voice their motivation, fears and aspirations for the future. I understand that **prospects don't want to "be sold," rather, they need help to buy**.

I understand that the guidance process requires 3 steps, that I repeat until a decision is made: **Connecting, Untangling** and **Advancing** toward a Sale.

1. I will attempt to **connect** and build a trusting professional relationship with prospects.

2. I will engage in conversations that will help the prospect **untangle** their emotional resistance to change. I will help the prospect explore the emotional barriers standing in the way of a decision to buy.

I listen with empathy. I don't interrupt when a prospect is speaking. I maintain eye contact and give visual cues that I am not only hearing what's being said, but drinking it in, learning from it, and understanding it. I ask follow-up questions that demonstrate that I have listened carefully. I prompt reflection by commenting on the emotional import of the person's story.

3. I will offer solutions and next steps that are tailored to the prospect's unique journey and their stage of readiness for change. I will **advance**

the prospect taking small steps, and building upon those to an eventual decision.

My follow up with prospects is creative, prompt, and personal. I do this to communicate that the person had an impact on me, I heard what they said, and I am eager to build on a next step.

I will "give up the result" and instead focus on my process and behavior. I know that I can't control a prospect's decision, nor can I convince them. Focusing on the pressure to fill units will cause stress and fear for me, and place undue pressure on the prospect.

My time is valuable – I will spend it where it counts. I will protect and defend my Time in the Selling Zone®

I believe I can help prospects "get ready" when I am able to inspire, facilitate, and assist them in the work of addressing their emotional barriers to change. My success depends on my ability to focus on spending more time with fewer prospects, planning carefully, journaling what I learned, being curious, building trust during tours and home visits, using empathetic listening techniques, and following-up creatively.

I am a sales hero.

JULY 31, 2017

Dear senior living sales counselor,

You've got a hard job. I know because I've been there. After nearly 20 years working as a sales counselor, sales director and community owner, I've seen first-hand how difficult (and rewarding) it can be to guide older adults and their families through major life change.

What you do every day is heroic, and you deserve a little inspiration and support along the way. That's why we're launching Ask Alex, an advice column exclusively for senior living sales counselors. Every month, I'll post a question and respond with advice from my own time "in the trenches" and from the sales teams we have the pleasure of working with at Sherpa.

Confession: I don't know all the answers, and I won't pretend to. But I am inspired by the stories I hear every day of sales counselors who work diligently, under ever increasing pressure to produce results, to guide older adults through change. Given all you have shared and how much encouragement you have sent our way as we

developed and grew Sherpa, I hope you find that this forum provides you with an opportunity to participate and share your thoughts.

The first Ask Alex post went live today on Sherpa's blog, and you can read it here: [Ask Alex: Whom Should I Hire To Boost My Sales?](#) I know many of you can relate to Brandi from Balfour's question about choosing effective and empathetic sales counselors, and I hope you can find something in my response that resonates with you directly.

How To Ask Alex

Do you have a question about senior living sales? I invite you to email me at AskAlex@sherpacrm.com.

No question is too big or small. Just be sure to note whether or not you want to keep your question anonymous.

Look for another Ask Alex answer next month. In the meantime, you can always reach me on [LinkedIn](#) or catch me at industry [conferences and events](#) throughout the year.

Stay heroic,



JANUARY 12, 2018

Dear Ask Alex,

My sales team hasn't hit their move-in goals for the last three months. With the holidays over, I know I need to make some decisions and that my own job could be at risk if we can't get back on track. So, how would you describe the ideal sales team? And where should I start?

– **ANONYMOUSLY HOPEFUL**

Wow. First, let me say, I understand the tough position you are in. It is a bummer at the very least, and very demoralizing. Without knowing all the details of your particular situation, I also want to issue a strong disclaimer. My advice is a limited view of the larger issue and should be taken in context within your environment.

In my view, an ideal sales team knows each other's strengths, they all work towards the same goal, and they give their prospects the full benefit of their different perspectives and personalities.

A great team shares "leads" and they have open conversations and planning sessions about their ideas, insights and strategies for each prospect they work with. They don't really care who "closes", and they own the result together. They all contribute towards "opening," meaning they work together towards greater insight into the issues their prospects are facing, they brainstorm on personalized [Creative Follow-Up](#), they insist on focused planning and fresh strategies.

Having a great team helps with "empathy fatigue." Guiding people towards a decision takes an emotional toll on any one individual; they share the burden.

It is common for Sales teams to get high when they close, and low when they don't see results. It can be an emotional seesaw. The team leader maintains a feeling of equanimity, the state that is always confident about your ability to perform a task and focus, regardless of the situation.

In leading teams through vacancy slumps, I took my attention off "vacant units," "new inquiries," "move-outs" and "competitors." Since I really can't control any of that, I tend to panic and the team feels

demoralized. Instead, I shift my attention towards opportunities to advance the prospects I have and to the tasks at hand.

So, what can you do? This is where I would recommend starting...

First (and most importantly in my opinion), **respect your energy.**

Your energy is your time and focus. We are far too loose with it, and often we let other people with other priorities just take it away. (No, you can't help the business office with the paperwork, or run off to buy balloons for the event). Your time is very valuable, you are a sales

professional, and you will devote your time to what will make you and your team successful. No one would ask the surgeon to clean up the OR after the operation, or the nurse to go change a light bulb for a resident.

Next, **identify leading indicators of daily success.**

An ideal sales team is a team that produces results. But, practically speaking, it's not effective to look at how many sales you have made on a daily basis. Instead, think smaller. Know your conversion ratio. Set goals your teams can actually influence with their effort instead of focusing on the monthly, lagging outcomes of their efforts. (More on goal setting coming soon!)

So, what is our plan of action?

- Spend four hours in the Selling Zone® per sales team member daily.

Here's how we're going to allocate that time...this will vary day to day, but on average:

- An hour a day planning together for next steps with our "Top Ten" prospects
- A half-hour per day individually preparing Creative Follow-Up for prospects
- The remaining two-plus hours either Face-to-Face with our prospects at home or at our community or voice-to-voice with our prospects by phone, email or text.

Every day, we will measure and record how we spent our Time in the Selling Zone® in our daily sales meetings.

In establishing your leading indicators of success, you've given your team something they CAN control – their time – and helped them focus on the prospects they can work today. (Sidenote: In our studies of the most successful senior housing sales professionals, an independent research firm found they allocated their selling time in a similar manner. See the latest updates on that study [here](#)).

Finally, **"go to the mattresses" for momentum.**

In the classic film, *The Godfather*, going to the mattresses means declaring all-out war. Watch Tom Hanks explain the concept to Meg Ryan [here](#). In a sales turnaround environment, make no mistake; you are at war with the status quo.

Focus on today. It is a new day; the "old lead" is a new lead today. Take a fresh look.

Over-celebrate. Ring the bell every time you get an advance. Practice self-awareness: Am I afraid of losing my job? What will my regional think if I don't get the move-ins? Am I willing to fail? Allow for your team members to do the same.

Don't let the 'bad' days - (no one is calling us back, the tour was cancelled, I got pulled into Ops meetings, I lost someone to the competition)- make you waver from your

goal: Here are the prospects we will focus on, and here is how we are going to spend our time with them today.

You see, Anonymously Helpful, once a sales team makes the decision to focus on what they can control and to eliminate distraction, they will take accountability for their own success or failure. By month's end, you will have a team of individuals who feel confident, not necessarily in their ability to sign more contracts, but in their ability to meet their daily goals. And, they will certainly have more fun.

Stay heroic!

JULY 31, 2017

Dear Ask Alex,

As a hiring manager of our Advisors, do you have any advice on the best profile of a counselor that would find Prospect Centered Selling to be the most natural style and process versus more task oriented sales?

—BRANDI AT BALFOUR

This is an important question, Brandi! As with most positions, hiring a great leasing counselor starts with a great job description. In this description, I would include a summary of the sales scenario typical of our industry and level of care, with clear expectations. A successful Prospect-Centered Sales® counselor should demonstrate competence in three key areas:

- First, in their ability to connect and build trust with the prospect and their circle of influencers.
- Next, in their ability to understand and “untangle” emotions arising from the current situation.
- And last, in their ability to guide a prospect towards the solution.

Achieving success in this realm requires a high degree of emotional literacy. We tend to hire for previous experience or “pedigree” and often ignore [emotional intelligence](#). Experience in senior housing sales is not necessarily an indication of future success. If someone learned transactional selling and they did it for 10 years, those habits become ingrained

and can be difficult to change, especially if they require a big paradigm shift and the person is not coachable. In my experience, it is easier to teach a new employee about the industry than it is to increase their emotional intelligence.

Bestselling author Daniel Goleman says emotional intelligence is twice as important as any other competency in identifying an outstanding leader. In his essay [“What Makes a Leader?”](#), he identifies five traits emotionally intelligent people exhibit: self-awareness, self-regulation, motivation, empathy and social skills.

Self-Awareness. In his essay, Goleman defines self-awareness as “the ability to recognize and understand your moods, emotions and drives as well as their

effect on others.” Hallmarks of self-awareness include self-confidence, realistic self-assessment and a self-deprecating sense of humor.

This trait, as it applies to sales, manifests as curiosity. I believe a great sales person is insatiably curious about themselves and other people: who are they, what are they feeling and how is that informing their thoughts about themselves, their life, relationships, etc. This is critical for listening, gaining good discovery, asking good questions and building trust.

Find more about the importance of curiosity on the Sherpa blog: [5 Reasons Why Curious People Are Great at Senior Living Sales](#)

Self-Regulation. Self-regulation is the “ability to control or redirect disruptive impulses and moods and the propensity to suspend judgement—to think before acting.” Goleman says self-regulated people also display trustworthiness, integrity, comfort with ambiguity and an openness to change.

In sales, this trait shows up in individuals who thrive doing planning sessions for prospects. Generally they exhibit an ability to stay “open” before making assumptions about what is going on and to be comfortable with that ambivalence we often hear from prospects who say, “I need to move, but I don’t want to!”

Motivation. Goleman identifies motivation as “a passion to work for reasons that go beyond money or status; a propensity to pursue goals with energy and persistence.” Hallmarks include a strong drive to achieve and optimism even in the face of failure.

Motivation in sales is the “why.” We need people who are motivated by a strong “helping instinct” and who won’t give up at the first sign of rejection. It takes time to help someone navigate the process of change, and tapping into our genuine desire to help someone transition to a better situation is what keeps us in the relentless pursuit. This trait will make someone less likely to give up on a prospect just because they are “not ready.”

Empathy. Empathy is “the ability to understand the emotional makeup of other people; skill in treating

people according to their emotional reactions.” Empathic people are experts in building and retaining talent, cross-cultural sensitivity and service to clients.

Almost a secret weapon in sales, these individuals demonstrate an ability to understand how someone is feeling, especially when voice to voice or face to face. What our prospects want is to be understood (“Leaving my home is hard, it makes me sad and vulnerable... I am afraid of running out of money... I feel guilty about telling my mom to move out of her home.”) An empathic person can recognize these emotions and validate them. This gives the prospect space to process their emotions without feeling “sold to.”

Social Skills. When it comes to emotional intelligence, Goleman defines social skills as “proficiency in managing relationships and building networks; an ability to find common ground and build rapport.” People with social skills are persuasive and effective in leading change.

In sales, counselors with social skills seamlessly interact and manage multiple relationships—within a sales team (hopefully with at least one more leasing counselor) and certainly with their colleagues in operations. Additionally, social skills are important in cultivating referral sources and managing the lead base. After all, the lead base is a collection of people in need of help, and we believe that we need good “gardeners” versus “hunters”.

Hiring a good sales counselor is as simple and as complicated as my answer. Establishing and finding an individual with the skills of a Prospect-Centered Sales® counselor is not an easy task, but is made easier by starting with a clear picture of that individual’s desired traits in mind.

You’ll find more good advice for “behavioral interviewing” in this Harvard Business Review article by Annie McKee: [How To Hire for Emotional Intelligence](#)

Happy interviewing! Best of luck, and thank you for your continued example of quality sales leadership in the senior housing industry.

Stay heroic,



SECTION 2

Intentional & Effective Goal Setting

APRIL 3, 2018

Dear Ask Alex,

I'm having trouble getting my prospects to call me back. I don't want to annoy them, but I also don't want to lose a sale if I can help it. What should my next step be—do you have any advice?

—TELE-FRUSTRATED IN SALES

Thank you so much for this question, I can feel your frustration, and I empathize. I've been there, and so have many of those reading this!

I am sure you are familiar with the dreaded call-out quotas, 'howdy-doody' calls, and the obvious routine of fishing the lead base with a wide net to try and catch the one prospect that is now 'ready'. We leave incessant messages along the lines of 'just checking in to see if you had any questions' in the hopes that a prospect will respond. It doesn't work.

If you've left a professional, brief, and friendly voicemail based on the context of their inquiry, and followed up early and often to let them know you're available for guidance, then stop calling. (Read my Ask Alex piece about leaving effective voicemails [here](#)). If you continue to call, you will seem tone deaf at best, and dismissive of their situation at worst. Either way, you will certainly push them further away.

The best thing to do is to stop and reassess. *Reassess your intention, reassess the prospect's current situation and finally, reassess your approach moving forward.* Let's delve into this further.

When you **reassess your intention**, you give yourself a much-needed breather. While it's wonderful to focus on others, be sure to check in with yourself as well. The

stresses of hitting quotas can really impact our thought processes. Maybe you're in a [sales slump](#) and you're worried about how you're going to hit your month-end goals. Take a deep breath. Stop thinking about how to convince your prospect; instead, think about how to connect and build trust with them.

Next, **reassess the prospect's current situation**. This is common sense when you think about it. For a prospect who has shown interest in senior living, a lot can change in two weeks (or however long it's been since your message). The person you are trying to reach is likely overwhelmed, nervous, frustrated and confused. You can likely relate to them, can't you? After all, trying to "sell" someone can also be overwhelming, frustrating, confusing and difficult. Don't worry, you're not alone in this journey and thanks to your approach, neither is your prospect.

Now, you're ready to **reassess your approach**. This requires action and, in my experience, usually means it's time for personalized [Creative Follow-Up](#).

There are as many great examples of personalized creative follow-up as there are prospects to send them to.

Use your skills and talents to think of something special. It may be that they expressed concern about the food at "those places" so you might send or bring over a meal, with a note from the chef. Or, you know that the daughter is very stressed. Send a little care package, asking nothing from her. Your favorite bath salts, something that means something to you and connects you to her. Perhaps you may find a poem, a quote from scriptures if that resonates, or something that you made that shows you took the time...(remember those cards that someone hand-made for us?) Remember, the more you know about them, the more ideas you will have.

Now, imagine that you have built this trusting, professional and empathic connection with your prospect. They'll feel more comfortable reaching out to you for help in making their decision and navigating uncertainty. Or perhaps they'll call to thank you for being thoughtful, thorough and authentic!

Stay heroic!



SEPTEMBER 28, 2018

Dear Ask Alex,

I love my job, but sometimes I feel extreme pressure when it comes to move-in numbers. Thinking about those empty apartments makes me nervous at month's end. Do you have any advice on how to stay focused?

– UNDER PRESSURE IN ARIZONA

Thank you so much for this question and for your honesty. This pressure is constant and unrelenting!

My personal, and professional belief is that pressure and stress come from trying to control people or circumstances that we simply can't. Here's a great quote from Anthony Moore's excellent [article](#) in which he addresses this same dichotomy:

"Pressure isn't real—it's just the stress you put on yourself in your head. Pressure is the result of limitations we put on ourselves to produce outcomes we don't control. When we focus on the outcome, we begin to expect things out of our control, which sets us up for failure."

What you can't control in our world of senior living

sales: When we focus on things we can't control, these emotions signal that we need to take action urgently, they're meant to help us escape and survive. However, this natural "flight or fight" does not produce extraordinary outcomes. Here are my "top 4:"

- We can't control a prospect's resistance to buying/change: Attempting to convince simply does not work. However, we often try to change this resistance by throwing every feature and benefit of our community in the hope that something sticks. We invite to events. We mail stuff. It only marginally works, and usually with the most urgent prospects. The rest of our lead base feels pressured and they "go quiet."
- We can't control the frequency and quantity of incoming leads: well, perhaps we have a say in this, but we have to react to every new lead that comes in, sometimes to the detriment of our in-depth work with an existing prospect. We respond by abandoning the in-depth work with fewer people by losing focus and casting a wider net. We engage with every new lead in a shallow way. Our follow up with existing leads also becomes shallow.
- We can't control move-outs: another notice means we have more apartments to fill. We respond by becoming demoralized, the mountain of work we have to do just got bigger.

- We can't control the competition: another shiny new community is opening 3 miles from yours. Yikes.

Reacting to this pressure yields mediocre outcomes.

Here is an example: It's the end of the month, you're about to visit a prospect named Mrs. Jones. She's been incredibly resistant to moving in, asks a lot of questions and has a complicated family dynamic. You also have not creatively followed up with the daughter that came in yesterday. You have not done a planning session for the tour tomorrow. Just then, your executive director walks into the office waving around yet another move-out notice. You have a call with your regional this afternoon about your results. You feel the pressure building inside of you. The voice in your head asks: *What if I don't make another sale this month? What if I spend all this time with Mrs. Jones and she doesn't close? What if I can't get my prospects to move in? What if I lose my job?*

In this whirlwind of worry, you start making not-so-good decisions. You cancel the visit with Mrs. Jones, put off the creative follow up and the planning for the tour. You begin scanning the lead base for prospects who may be "move in ready." In this mental state, your calls become

slightly more impersonal and calculated, an attempt to scour your leads for urgency and getting them to come in. Your efforts bear little fruit, and you end up receiving a lot of rejection. Now you are even more discouraged, and, you've potentially alienated much of your lead base.

You don't feel good. Sound familiar?

What you can control: yourself. The only things you can really control are your attitude, your behavior, and your mindset. You override the stressful feelings by becoming razor-focused on your process.

- You focus on the prospect in front of you before moving to the next one. This prospect, this strategy, this creative follow-up. You look deeper, you plan, you ask questions.
- You become clear about the prospect's motivators, fears and preferences.
- You plan for [advances](#), however small, because you know that generating advances increase the likelihood of a close.

I find this to be one of the hardest things to do in sales. It is easier to react. But you can do it. Decide that you won't let the pressure modify your process or guide your behavior.

You will feel open, focused and confident in your abilities. That is what extraordinary sales professionals do.

I'd also like to share an excerpt from the "Sales Hero Manifesto." It's a piece I created after being inspired by another hero like yourself, who had a similar question. There's a section that I feel fits this question perfectly:

I am a prospect-centered sales^o person... *I believe in the life enhancing opportunities that our product provides... I recognize prospects as persons with all the rich history, complexities, quirks, interests, desires, hopes, and fears of any person. I honor that complexity... I will "give up the result" and instead focus on my process and behavior. I know that I can't control a prospect's decision, nor can I convince them. Focusing on the pressure to fill units will cause stress and fear for me, and place undue pressure on the prospect...*

I am a sales hero.
—Sales Hero Manifesto

See the full Sales Hero Manifesto on page 4.

Stay Heroic!



FEBRUARY 6, 2018

Dear Ask Alex,

Although I always go into the sales office with the intent of accomplishing everything on my to-do list and meeting my goals, I sometimes find myself with no result to show for my work at day's end. How do you approach your day, and what steps should I take to stay consistent so I can reach my goals?

–STRESSED IN SALES

First, thank you for your honesty. When I read your question, I could hear the sense of urgency and desire to perform in your voice. I'd like to start my answer with this: you are not alone.

Everyone needs help in prioritizing their tasks and goals. It's helpful to remember, however, that in senior housing sales, the importance of setting goals is more about outlining what you can control, rather than focusing on what you can't control. You can control your behavior, your attitude and your productivity. You cannot control the result. For me, setting goals is about recognizing the difference between being focused on behavior versus being focused on outcome.

This shift in thinking will have a major impact on how you set yourself and your prospects up for success. And the good news is that you can begin implementing this change today.

As a sales professional, my goal is to work towards 'opening' instead of 'closing' my prospects. (I explain this concept further in another Ask Alex, which you can read [here](#).) Put simply, I believe investing more time in high-quality interactions with prospects is the best way to build trust and ultimately to have greater

success in sales. Let's walk through how I set goals specific to this approach.

First, define what "success" means to you.

[Research shows](#) it's easy to become addicted to the rush of dopamine we get when we cross off a task on our to-do list. But that rush can wear off quickly if we're not seeing results that align with our personal view of achievement. That's because success is different for everyone. Your work environment, internal operations and career focus may differ entirely from the sales counselors you're hoping to emulate. Take time to formulate your own definition of success—apart from quotas—and give yourself permission to celebrate those little victories.

My definition of success for senior housing sales is that, regardless of the outcome, I want to help prospects navigate change with empathy and integrity. As you might expect, my to-do list doesn't center around

specific activities (tours, call-outs, etc.), but instead is focused on how much quality time (what I call Time in the Selling Zone®) that I spend with prospects.

By controlling my time, and how I spend that time, I am motivated to engage in meaningful selling behaviors that drive better results. This makes me more confident, which in turn helps my prospects feel more confident in me.

Next, change how you think about your lead base.

We've been conditioned to see our senior housing sales "lead base" as something that should be aggressively attacked. We call out. We send brochures. We invite prospects to events. If they don't respond, we move on to the next person.

This approach results in us largely ignoring the potential resident's unique story and journey out of a desire to get 'heads in beds.' Now, we're starting to realize that

doesn't work. We know that each prospect is unique in the way they navigate this emotional journey. This is a huge decision for them and for their families.

We have to bring this realization into our selling mindset, for ourselves and for our team. If you continually look at your lead base as a subset of activities, your prospects become less than human, and worse, you'll feel like a bother, draining joy and purpose out of your daily work. Sales is emotionally difficult for you and for them. At the end of the day, you're offering help and solutions to those who need it. Keep that in mind.

Finally, (and what's often the most difficult) set daily goals you can control.

I said this at the beginning of this post, and it bears repeating: setting effective goals is about outlining what you can control. As sales professionals, we can control our time. [Research performed by ProMatura Group](#), shows that best performers in senior housing sales spend on average 4 hours per day in the Selling Zone®.

Of course, this is for an individual sales counselor; if you're a part of a sales team, this should be 4 hours per sales counselor per day. Below is what a typical day would look like for me:

Planning: I would set a goal of spending approximately 30% of my total selling time per day engaged in

planning on active prospects. How can I generate an advance? What's the next step? What do I know (or not know) about this person?

Creative Follow-Up: Along with Planning, Creative Follow-Up is a proactive activity I find to be more effective than multiple tours or call-outs. On average, I send 3 or 4 creative follow ups a day, approximately 10% of my available time.

For the remainder of my time, roughly 2 hours per day, I engage in more traditional activities: voice-to-voice with a prospect by email, phone or text; or face-to-face with a prospect through tours or home visits.

It's also important to accept some variability. You may have a very focused day in which you get up to 5 or 6 hours of dedicated selling time. Or, you may have a distracted day in which you are pulled into a lot of marketing or operations issues.

If you wanted to get more granular you could. For example, you could set goals for home visits and tours or goals for call-outs. But, as a rule, I find that it's best to start simply by setting goals around time first, and then delving further into how you're spending that time.

Last but certainly not least for me, I always focus on having fun - it's something I can certainly control!

In senior housing sales you control your destiny by changing the way you think about success and by building goals that support that mindset. Over time, you will build confidence and become more motivated to be at your daily best.

Stay heroic!



OCTOBER 30, 2018

Dear Ask Alex,

I am often faced with a lot of distractions on any given day at the office. Any advice for how to best structure my day?

– INTERRUPTED IN OREGON

I have touched upon this a few times, tangentially, but the question calls for a deeper dive into the Ideal Daily Agenda for Results Enhancement, aka IDARE (I totally made that up).

By now you know that your most precious resource is your time. Prioritizing your day is tricky, with the many interruptions and distractions that go on in our communities.

Before I share what we have found to be the ideal daily agenda, let's look at the genius of [Steven Covey's Time Management Matrix](#). The grid is not meant to determine what is important to do in general, rather, what is **important** to your ability to be successful in your role. So, let's start with the question: What are important activities for me to do in order to achieve my sales goals? Check the next page to see what our grid looks like.

Let's examine each quadrant. Note that the [Selling Zone](#) spans across both Important quadrants.

The "Have-tos" (Urgent and Important): this is a no-brainer. The urgency is coming from others, and we need to respond and make time for it. We are

reacting to things in this quadrant, and we know we have to do them.

The "Squirrels" (Urgent and Not Important): This is the trickiest of them all. According to Covey, most organizations spend 80% of their time here! Note that I have Ops and Marketing activities that dovetail into Sales but are NOT sales. I am not implying that these are things that shouldn't be done, I am saying that they could be delegated to others. Ideally, there are others in the community that can provide support, so that these tasks are taken care of while you are focused in sales. The addition of a move-in coordinator and a sales support position can do wonders to boost sales.

"Laser Focus" (Not Urgent and Important): Here is where the most successful companies spend the majority of their time, or the 80% that the mediocre ones spend with "squirrels." We developed a daily agenda in sales with this quadrant in mind. Our entire methodology is wrapped around our own ability to focus and to be

proactive. This is the zone where *Planning and Creative Follow-Up* take place. As a rule, it is any activity that we initiate without an external trigger.

Did you ever have a prospect call you demanding that you plan for their next step, or complaining that you did not creatively followed up with them, or wondering why you have not asked to come over to visit them at their home? Nope, it doesn't happen.

"Escapes" (Not Urgent and Not Important): Another no brainer, we don't want to spend much time here. However, sometimes we need a break. May I suggest some constructive break ideas that do not involve our cell phone's social media feed or getting tangled with a resident that wants something from you? Take a walk, with headphones and to your favorite song. Find a place to lie down and meditate or breathe deeply for 5-10 minutes. Stretch. Heroes need breaks.

A Sales Person's Ideal Day in Seniors Housing Sales

Time management to boost sales success*

*Adapted from Covey's Time Management Grid

	URGENT	NOT URGENT
IMPORTANT	<p>HAVE-TOS <i>External Demands</i></p> <ul style="list-style-type: none"> • Reporting upstream • Crises • Walk-ins • Tours • New Inquiries 	<p>LASER-FOCUS <i>The Pro-active Zone</i></p> <ul style="list-style-type: none"> • Prospect Planning • Research and Preparation • Creative Follow-up • Home visits and Call-outs • Trust-building/nurturing <p>THE SELLING ZONE</p>
NOT IMPORTANT	<p>SQUIRRELS <i>Things We Need to Delegate</i></p> <ul style="list-style-type: none"> • Event planning/marketing • Ops meetings • Move-in coordination • Paperwork 	<p>ESCAPES <i>Only During a Break!</i></p> <ul style="list-style-type: none"> • Time with residents • Trivia/emails • Social media • Some calls • You know what you do :)!

So let's look at your ideal day, or how to be the most focused and effective with your time:

Every day starts with a Sales Meeting. I hope that your Executive Director is able to attend, because his/her presence is important to planning, delegating, and executing on individual prospect's strategies. Otherwise, perhaps you have another team member that can join you, or your Regional. It is harder to do this by yourself, since a small group can help us get out of our own head, and the assumptions we make when our thoughts go unchallenged. Regardless, start with this:

Who is coming in today? Go to their profile and do a Planning session. Be curious, inquisitive and prepared for when this person comes in. Ask yourselves: Do we know who they are, what is their story? Do we understand their current environment? Do we understand why they would move at all (Motivators), when they should move (Objections), and should they move here (Preferences)? What Stage of Readiness are they in? What Advance are we prepared to ask for based on this?

Then, look for Creative Follow-Up opportunities. Examine what happened with prospects yesterday, and determine at least a couple of creative, and personalized ways to reach back out to them. You will probably be able to do a couple, maybe 3.

Once you are done with CFU's, review your Top Ten and update their action plans. If you don't have a good plan, do a Case Study to figure out the next best step to advance.

Then, and only then, look at your pending activities list and start to execute them, in the most thoughtful, strategic way possible, given your limited time. By now, it is probably 10:30 am, and you have a solid foundation to get started. You will know the kind of conversations you will have during the tour or home visit, you will know what you specifically intend for every one of your calls scheduled for today. You have taken a little time before you make calls or send emails to tailor your conversation based on their own unique set of circumstances, fears, motivators, and aspirations. Throughout the day, count and celebrate advances. This will generate in you a bunch of confident and positive energy in the midst of a sea of rejection.

To recap, this is your Ideal Daily Agenda:

Start your Sales Meeting. *During the Sales Meeting:*

1. **Plans for today's Appointments:** Review who will you be Face to Face with today and Plan together (questions, advances we may try to get, quick Case Study on them)
2. **Creative Follow-Up from yesterday:** What Follow-Up should we do that is personalized and creative? Review Yesterday's Selling Zone
3. **Review "Top Ten",** do we have a current action plan for all, do we need a PCS to come up with something more creative?
4. **After the Sales Meeting:** Focus on executing scheduled activities with the lead base.

Disclaimer: In sales, no two days are alike, and this is just a framework to get you on track. Some days you get as far as number 1, and then all hell breaks loose. That's okay. What matters is that you do the Important but Not Urgent stuff first. By the way, "slow" days with no tours are ideal for Planning and Creative Follow-Up.

Have a nice, productive and focused day!
...and of course, stay heroic.



SECTION 3

Connecting with Prospects

NOVEMBER 28, 2017

Over the years, I've fielded lots of questions about prospect behavior. Generally those questions revolve around **getting prospects to do something**. You can fill in the blank with: Say yes to a home visit, call me back, talk about money, tell me what other competitors they are considering, give me permission to talk directly with their mother, etc.

–MUSING IN ST. LOUIS

My answer to those questions – based on countless interactions with prospects to date – is that one foundational skill above all others determines your success in senior housing sales. That skill is your ability to cultivate trust with your prospects.

When thinking about trust, sometimes it's easier to define what it is not before we can understand what it is. Cultivating trust involves more than being a product knowledge expert – that is competence. It is not just about getting people to “like” us. Trust goes deeper than product knowledge and niceties.

I like to think about trust as what you cultivate with another person in order to help them navigate uncertainty. It inspires feelings of connection and safety with someone. When it is present in a relationship, people will open up to you ... talking about their family dynamics, their feelings of fear, sadness, loss, excitement, etc. Only then can you really understand how to provide guidance that is most appropriate for their unique needs. More importantly, you will create a safe, “non-salesy” zone where they can untangle their own emotions and thoughts about their situation.

If I haven't mentioned it yet, building trust demands a suspension of judgement regarding their situation as well as your own self-interest. You can not be fully invested in helping them and they shouldn't trust you if your own motivation to close outweighs finding a solution that is best for them. Here are a few other key strategies for building trust:

- 1. State your intention:** Tell the prospect the why behind your role, what you are trying to do. Otherwise, prospects will ascribe your intentions based on their fear of being sold. “Why should I trust you,” they think. “Your goal here is to sell me something, not help me.”
- 2. Be brave and ditch the script.** Empathize. Make yourself vulnerable so that they have permission to do the same. Listen to them with respect and discipline. Be curious.

- 3. Do some planning before any call or visit.** You will become trustworthy when you take a bit of time reviewing what you learned. Based on your intention to help them make a decision and what you learned, what is the best next step that you are going to help them take?

With these strategies in mind, here are a few tricks I personally use to ground myself in advance of a prospect interaction. I hope they will work for you!

Getting mindful: After I do some planning and immediately before I pick up the phone or go to meet a tour, I spend 30 seconds getting grounded. I close my eyes and just listen to the sounds around me. I think about the person I'm meeting and stimulate my own curiosity about them. Shutting my ego off. When on the phone with the prospect, I will sometimes close my eyes. It helps me to shut off my ego and to listen better, without my own intentions blocking our discourse.

Leading with intention. I state and re-state my intentions – for my prospects but also for myself. It helps guide my own conversation back to what is most important and reassures prospects that I’m not there to sell them.

My mantra may sound a little like this: **My intention is to try to understand your situation, and provide guidance and support along the way regardless of your decision.**

I hope you found these strategies helpful in thinking through your own sales approach. I look forward to hearing your thoughts and feedback on why cultivating trust with prospects is important to you.

Stay heroic,



JULY 5, 2018

Dear Ask Alex,

I love chatting with prospects, but I find that our conversations tend to stay surface level. I want to dig deeper! What should I do, or ask, to get them to open up?

–WONDERING IN ILLINOIS

Getting prospects to open up is not easy. Every person is different, with a unique situation. If a prospect feels that you're attempting to "sell them," they may put up their guard. Instead of trying to find the magic question to ask *them*, ask *yourself* this one instead: What does my prospect's current and past *life* story say about their values? Let me explain further.

A life story is the series of events, moments and contexts that have established an individual's view of the world. That's a big concept in a little sentence. Now, why is listening to your prospects' life stories so important? Julie Beck explains it wonderfully in [her article](#) at *The Atlantic*. I recommend reading the full piece, but here's an excerpt to get you started:

"A life story doesn't just say what happened, it says why it was important, what it means for who the person is, for who they'll become, and for what happens next."

So, how do you go about getting their life story?

Be patiently curious. Prospects are facing a tough decision. If they've contacted you, then they are aware that a change needs to happen. This doesn't mean it feels any easier. And they may sense any intensity or extreme interest as bombardment. You can't immediately respond to an inquiry with "so, tell me, what was your mom like when you were growing up?" It's a great question, but you must build trust to earn the right to ask it.

Ask questions about their good times and their tough times. Sounds scary right? To allow ourselves to ask the questions that can deepen the conversation, we have to become vulnerable. After you have established trust

by showing them your intention to help, not "sell," you'll find that their responses to more personal questions are often well received and allow them to tell their story more fully. I'll give you an example from my own experience as a sales counselor. I once had a prospect we'll refer to as "Mr. B." After a few conversations, and once trust had been established, I asked Mr. B, "What was the hardest decision you ever made?"

"Quitting smoking!" he said without hesitation. "How did you decide; did you ever think that you would be able to do it?" I asked. He responded, "Because it was good for me." Now, cut back to my present conversation with Mr. B; it was clear that a move to a community would be good for him, but he was ambivalent about letting go of his home.

However, by telling his story of quitting smoking, he was reminded of his wisdom, resiliency, and ultimate ability to make the right choice when faced with a tough decision. This gave Mr. B the confidence to know that he could face another tough decision and trust himself to make the right choice.

Listen for the values in the story, not the plot: When people tell us their stories, the really good stuff is often found “between the lines.” As a sales counselor, it’s your job to [listen](#) to what’s not being said. If a prospect tells you about her husband’s former missionary work and how they moved to China with two young children, do you merely hear the words “travel” and “mother,” or do you hear “commitment” and “adventure”?

Compare and contrast. Once you’ve become familiar with their life story, observe their current situation. At Sherpa, we call this a “Typical Day.” What is their life like? Are they able to live out their values? Let’s look at some examples that show how a prospect’s situation may inhibit their ability to do that.

Keep in mind, the story is the key to finding their values; *their current situation* is the key to finding their motivators:

- “I started a volunteer group.” (I place great value in being of service). “I can’t drive to church any longer.”
- “I was a professor.” (I place great value in teaching

others). “I am alone most of the day, and my grandkids are far away.”

- “I was a researcher.” (I place great value in learning new things). “My eyesight is failing, and it is getting hard for me to read.”
- “I was a concert pianist.” (I place great value on playing music for others). “I don’t have a piano, and no one to play for anyway.”

People begin to consider a change when their situation is inhibiting them from pursuing what brings them joy and meaning. That’s why they’ve contacted **you**.

Be proud to witness the telling of a life story! When a person trusts you to hear their life story, they may tell you things that even they haven’t heard themselves say out loud. Speaking with an objective party gives them the opportunity to explore their life without fear of judgment. It is you, the sales counselor, the hero, that gets this privilege.

Exploring a life story provides you with a roadmap. This roadmap will help you guide your prospect’s decision making, identify their motivators, and prompt discovery into what is most important to them. Ultimately, you’ll be able to help them discover their capacity for growth and change in the process.

Remember, we all want to live aligned with our values, no matter how frail, no matter how scared.

Stay heroic.

MAY 8, 2018

Dear Ask Alex,

During my conversations with prospects, I try to listen closely but I get distracted at times. Can you help me become a better listener?

–CURIOUS IN SALES

You've made such a huge stride in your goal already by simply realizing you need, and want, to be a better listener. Active listening is the key to being an effective sales counselor and that starts with your intention: What are you listening for?

In his book "The 7 Habits of Highly Effective People: Powerful Lessons in Personal Change," Steven R. Covey makes an interesting note that 'most people do not listen with the intent to understand; they listen with the intent to reply.'

In the world of sales, I have noticed that our focus is on listening for problems so we can respond with our solution. In most cases, we ask questions to qualify for our product. We tend to avoid asking questions that would prompt a conversation that steers away from our solution. Becoming a better listener requires that you want to listen to understand. Let your natural curiosity be unhindered by the thought 'I have to close this person on my product.' Go deeper into the prospect's state of mind, and stage of readiness. It will also create a trusting bond that allows you to get "inside" the prospect's world, where you have a much better chance to understand how to advance their readiness to buy.

There is nothing more sublime than feeling heard and understood. This isn't just a 'you' problem. As a culture, we struggle to listen and are constantly distracted by all that's around us. Keeping that in mind, I think the best way to answer your question is by looking at the barriers that keep us from effectively listening with curiosity and from truly hearing, and being **heard by**, others. Then I'll explain how we can break those barriers to create openness and authenticity in our conversations with prospects. Here we go!

Barrier #1: Listening is challenging.

Anyone who disagrees hasn't worked in senior sales. Listening requires our focus, our energy and our time. Those are hard resources to give away when we barely have enough of each for ourselves. So, how do we rise to the challenge of listening? As a start, try to remove any stimuli that divert your energy away from focusing on the conversation. If you are on the

phone, try closing your eyes to eliminate distractions, if face to face, give your full attention to the person in front of you. We could talk about eye contact, body language, crossing or un-crossing legs. Bottom line, if you want to look like you are listening, then just listen! When you do this, you build trust and show your prospects that you respect their story and their time.

Since we're only covering the basics here, I'd suggest some homework for you by way of a great Ted Talk from Celeste Headlee on "[10 Ways to Have a Better Conversation](#)." I encourage anyone in sales to watch it.

Barrier #2: Making assumptions so we can move on...

How often do we find ourselves saying "sure" or "I understand." Most often, however, we find that we want to make quick assumptions and move on to our "next topic." When a prospect shares that they don't

do much cooking anymore, we are SO tempted to tell them about our dining program! So, we heard what they said about cooking, but what does that mean? Is it that they got tired of it? Is it that they have difficulty shopping for food? Is it that they are not inspired to cook for one person? And, is cooking important to them? You get my point.

Remember, listening happens in the context of a conversation. If you hear something interesting or funny or emotionally charged, you may make a mental note of it so as not to disrupt the flow, and come back to it later. "Mr. Jones, you mentioned earlier how close you and your wife were; I am curious, how did you two meet? Practice clarifying and confirming what you heard, so you feel confident that you understand them. You might say, "I want to make sure I understand you fully; it sounds like one of your biggest concerns is that you may not be able to bring all your furniture, is that correct?" These questions allow you to truly participate in the process and to seek confirmation from the prospect before moving forward. That, in turn, gives them back a sense of control, which ultimately leads to a more constructive and empathic conversation.

Barrier #3: We're afraid to be vulnerable.

In our line of work, if we intend to listen to understand, we will need to become vulnerable. That's uncomfortable at times. It feels like uncharted

territory, and we run the risk of not having answers, not knowing what to say, provoking objections, or accidentally touching emotionally sensitive issues.

Being willing to be vulnerable was always a challenge for me. The voice in my head would convince me that I should be worried and nervous. So, I practiced becoming comfortable with being vulnerable with prospects (and others in my life)! I found that nothing terrible happens, quite the contrary in fact. I discovered that empathic conversations were powerful and vital to facilitate "untangling." They allowed the prospect to hear themselves talk about what they value and where they are stuck, therefore increasing their readiness for change. Simply put, these vulnerable and open conversations allowed prospects to convince *themselves* and then make a confident decision. The worried voice in my head became silent. I found that by really listening, I could learn a lot about life and how people make difficult decisions.

While I usually sign off by saying 'stay heroic,' I think another salutation might be fitting for this answer.

Stay curious (after all, most heroes are)!



JUNE 5, 2018

Dear Ask Alex,

While I pride myself on being empathetic and 'digging deep', I find myself mentally exhausted after the first couple of prospect interactions in the day. Do you have any advice on staying focused and energized?

–BURNT-OUT IN DALLAS

Thank you for your question; I know that so many readers can relate. What you're describing is what I refer to as 'empathy fatigue,' and it's incredibly common in highly emotional sales. It was also one of the biggest challenges I faced as a new sales counselor.

Every day you're putting yourself in others' shoes, answering questions, dealing with complex family dynamics and ardently attempting to connect with prospects at every level. It takes a tremendous toll on your emotional and mental energy. Physically, you may feel drained. On top of that, you're balancing your personal relationships and family demands, all while trying to stay positive and healthy. It's a challenging role; it's also why I call sales counselors like you "heroes"!

But, even heroes get tired. As the saying goes, "... you can't pour from an empty cup." When I got emotionally fatigued, I started to lose focus on the big picture, I tended to avoid "difficult" prospects and began deflecting to busy work. Bottom line: it can be detrimental to sales success.

So, how can you deal with empathy fatigue?

Practice self-awareness: Stop and look within. What emotions are guiding your behaviors at work? Are you taking prospects' rejections personally? Once you realize what emotions are driving you, you can start to control them.

Ask your team for help. It's tempting to try to do it all yourself, but it's not very effective. We all need a bit of help in accomplishing our goals. Talking about our challenges with our team members can help us discover solutions and understand how we're allocating our time. (For more on effective sales teams give this [Ask Alex](#) a read!) **Remember, it's not all on your shoulders.** Engage with your team through brainstorming and planning for next steps (and maybe laugh a little while you're at it).

After all, a successful community with satisfied residents is a team effort!

Next, **make sure you're [setting boundaries](#).** This may sound harsh, but it can make you a better, more understanding sales counselor. It's common for professionals in our industry to become overwhelmed by the emotions and heaviness of what we witness. However, if we don't set boundaries or establish a healthy degree of detachment, we risk taking rejection or criticism personally. This, in turn, affects our ability to strategize and empathize effectively in order to guide our prospects to their next step. Emotional intelligence (EQ) plays a huge factor in our ability to set boundaries and build relationships during emotional sales. It's also a crucial part of [Prospect-Centered Selling](#)[®] and, once you get the hang of it, you'll see how satisfying and motivating your work becomes!

My last piece of advice is this: **protect your time and energy**. Don't be afraid to delegate tasks to others so that you can dive into your work uninterrupted. Office settings can be rife with distractions; it's essential to designate time and space for creative thinking and prospect planning. If you don't, you'll soon get stuck in a merry-go-round of phone calls, drop-ins, and sudden 'to-dos.' Continuous stopping and starting rarely result in a productive day.

Don't be discouraged if these steps are a bit difficult to put in place at first. Take it day-by-day; I promise you'll start to feel that fatigue dissipate, and you'll develop more empathic endurance.

Stay heroic!



SECTION 4

Practical Sales Tactics

SEPTEMBER 7, 2017

Dear Ask Alex,

What is the most effective way to ask for a home visit? I'm specifically thinking about someone with whom we don't have a long-standing relationship and have never toured.

–BEA AT THE GATESWORTH

Navigating a home visit can feel uncomfortable at first, especially because the prospect, who may have been calling around to other communities, is not used to being offered a home visit as part of the selling process. From the sales counselor's perspective, it can feel that we're "invading someone's privacy." But when we consider that our community could become their home for the rest of their lives, a home visit is the best way to create trust and connection.

First, clarify your own intentions for doing home visits. It will help you deal with your fear of asking or being intrusive. Ask yourself:

- What am I trying to accomplish by going to someone's home? (If you think you are going there to "sell your community," don't even ask!) Personally, I love them because I get such great insight, trust and perspective as to the real situation the person is in. Do some planning in advance!
- How will it benefit the prospect for me to be at their home? Remember that people feel comfortable at home. They feel important when someone comes over and they get a chance to describe what their life is/was like. They feel valued.
- What will I do and talk about once I am there? My suggestions: Always bring a little something, perhaps a meal. Ask about family pictures you see. Be a gracious guest, and let them give you a "tour" of their life and home.

The ability to state your intentions and the resulting impact on a prospect's willingness to trust and open up to you extends to far more than home visits. It is important to get very good at stating intentions, and offering a home visit is part of that. I do this very early in the initial inquiry. You want to establish trust by letting the prospect know you are not there to "sell" and that that home visits are part of the process of helping them make this big decision.

This sounds something like:

"Mrs. Jones, here at (your community), it is our practice to offer to come visit you and chat in the comfort of your own home. Many people find that an initial meeting at your place is more convenient. My intention is to be a guide to you and your family regardless of whether you choose to move here or not. Perhaps you would be open to me coming over and bringing some lunch? What is your favorite food?"

Or you may offer a story of a home visit you did with another prospect:

"I was over at a lady's house who was not ready to visit here yet. We had lunch and talked for two hours, telling stories about life! Such fun..."

By the way, if you are talking to the adult children, you may also offer a visit to the adult child. Set the expectation that you are happy to meet them and the parent at their home. You may also offer to meet an adult child near their workplace or hand-deliver information they requested with an offer to walk through it personally.

I think the main reason it feels awkward to ask for a home visit is that we are afraid that prospects think of us as salespeople, and no one wants a sales person to pitch them at home. I certainly don't! The first few times I asked for home visits, I had my heart in my throat and

was more than a little clumsy in my approach. If you have the courage to work your way through this initial awkward period, the feeling will fade with time and the rewards more than make up for the effort expended. Prospects are delighted to have someone care enough to go to their home, and you will differentiate yourself from the "pack."

Stay heroic,



AUGUST 14, 2018

Dear Ask Alex,

Recently, you addressed the question of “how to ask for a home visit” and provided some practical examples. Our question is, “how do you know when to ask for a home visit”; is there a right time?

– **STERLING ESTATES TEAM**

Thank you, Sterling Estates Team. Home visits are critical to boosting sales results. Delving deeper into the subject is well worth it.

First, let me re-address the “why” of the home visit. *What’s in it for us as the sales counselor?*

For one, it differentiates us from the “pack.” If you take time out of your day to visit the prospect right where they are, it leaves an impact that will influence their decision when they contemplate where to move.

Second, it helps us build trust and connection. We all feel comfortable and emotionally safe at home. Prospects will be happy to share more about their [stories](#) in their own environment. Also, being in their home gives you the opportunity to ask about what you see, such as their photos and memorabilia.

Additionally, it helps us understand the “competition.” For nearly all of our prospects, the “competition” is where they live now.

Think of the home visit as an individual, competitive study. By visiting your prospect’s home, you can better understand their ambivalence about moving and help them navigate those feelings down the road.

So, what’s in it for the prospect? Bottom line: they’ll feel important, valued and genuinely seen. They’ll develop a deeper connection and trust with the person who took the time to explore their life further. Prospects are often looking for someone to confide in and to help them navigate this significant change. Home visits offer an excellent opportunity to solidify yourself as that trustworthy [listener](#).

Now, back to your question. When is the *right* time to ask for a home visit?

The answer is, anytime! Let’s explore some common scenarios so I can explain further:

During the Initial Call

Imagine being able to double your chances of a face-to-face interaction by offering the option of either a tour or a home visit! You can do it in the context of [stating your intentions](#) or just as an advance.

Before or After a Tour

- Prior to the tour, consider sending a personal note. Something like this: “Mrs. Jones, I know you are coming in to visit us next week, I was wondering if your mom would like for us to meet at her home first? We find that she may feel more comfortable before the tour if she were to have the chance to meet me first.”
- Following a tour, you could send something similar. For example: “Mrs. Smith, now that you know a lot about our place, I’d like to return the favor and get to know more about yours! Your home sounds lovely, and it would be my honor to visit you.”

When you just need to get out of the office!

I am only half kidding. You know those quiet days with no tours? Make a call and grab your keys.

When you feel “stuck” You may feel that way because you are in the dark about your prospect’s real situation. Or, you may have made some assumptions (don’t worry, it happens to the best of us) and the prospect has “gone

dark.” When that happens, hold fast to your empathy and reach out appropriately. For example: *Mrs. White, I know you are not ready to make a decision just yet, and that’s okay! I was thinking about you today and wanted to bring you a dish from our chef that I think you’ll like. I’d love to stop by for a cup of coffee and visit with you.*

In every scenario, be confident, state your intentions clearly, and you’ll feel ready at any point to request a visit.

Since this subject is so near and dear to me, and to many readers, I’d like to extend an invitation for those interested to [send me](#) their thoughts and stories regarding home visits. I know I would love to read them, and perhaps featuring them can help to inspire others! By the way, you can visit our home office at Sherpa anytime.

Stay heroic!



MARCH 6, 2018

Dear Ask Alex,

What should I say in a first email to a prospect or their family member when they inquire?

Do you have any tips on wording so I can connect with them and stand out from my competitors?

–STARING AT DRAFTS IN HOUSTON

This is a wonderful question for two reasons. First, you're bringing to light a crucial digital shift in how we interact with prospects who may be considering our community. Second, you've revealed in your question that building trust is still the objective in your work. That's admirable! Let's get started.

With any point of contact, you have an opportunity to advance the relationship and sale by building confidence, trust, and intimacy. And you're right, it can be tough to feel that you're able to do that in an e-mail. Phone calls are much more navigable; in fact, I touched on this subject in a prior Ask Alex that you can read [here](#) when you get a chance.

E-mails can feel a bit cold but, when an e-mail is all you have to build on, you have to warm them up. Do this by initially establishing your intention, intended tone and communicating your willingness to continue listening. Let's flesh this out a bit further.

First, establish your intention.

Without making definitive conclusions, think about what you're hoping to achieve based on what you already know about this prospect. Think about how you received their e-mail address. Did they leave a frantic voicemail, a hurried e-mail or did you simply receive a short description through a lead referral service? Set your intent using these contextual clues.

Many prospects are apprehensive to give their phone number because they fear being hounded, or 'pushed' into something that's uncomfortable. They want to understand their options, and they want to know the type of individual with whom they'll be working. Your job is to show them who you are while remaining confident and poised. Kind of like a 'professional vulnerability,' if you will. Let them know that you

understand the big decision they are facing and that you intend to help them find the right solution.

You may be thinking 'easier said than done Alex.' But, that can be said for most things worth doing, right? We can shape this idea up further by establishing tone.

Second, set your tone.

Your tone is how the reader reacts to or interprets your energy when they read your e-mail. Be professional and friendly, not robotic or aggressive. Let the e-mail give them space while offering your intent to help and supply them with additional information should they need it. (Note: We often confuse the ideas of professionalism and expertise. While I never withhold

information from prospects when requested, and while I always answer their questions thoroughly, I don't bombard them with a list of features and benefits. It's a dance, not a wrestling match.)

When considering tone, take comfort in knowing your goal is to help guide them towards making the best decision for *them*. You can control your intention, not how they respond. Approaching your communication from this perspective can help you project an open, reassuring tone.

Finally, consider what is unsaid.

I talk a lot about opening prospects instead of closing them, but email can present a unique challenge. So, how do I start this process via email? By expressing availability. And, I remember that while a prospect may be **asking** for information, they're **really looking** for guidance. They need a trusted professional to explain this process and make it less scary.

Generally speaking, I lead and close emails with my intent—I remind prospects that I am here to listen, offer information and to help them make the right decision for *them*. I have found that this message makes prospects more willing to share their information and serves as the critical differentiator between myself and noisy, flashy competitors. ([Here's a great article detailing how emotions influence buying decisions.](#))

For further exploration, I've included a sample email below to get you started. I hope it's helpful!

Dear (Insert Name),

My name is Alex; I'm a Leasing Counselor at (Insert Community Name). I'm sure you must be flooded with calls and emails so I will be brief.

I understand that your mom, Esther, is having some difficulties. I know firsthand how a parent's circumstances can weigh on a family and I commend you for starting this process; I know it can be complicated and confusing. I also want to tell you that I am here to offer guidance through it all. I don't know your particular circumstance or story, but I would love to learn more about you and your mom, where you're at, where you want to go and how I may help you get there, regardless of where you are in the process. My intention is not to sell you or your mother on this community, but to help you both untangle some of the facts and emotions that go into choosing to leave home and find a new one.

I'm happy to meet you at your convenience, whether that be at a coffee house, your mother's home or my office. The goal is to start a conversation in a way that is meaningful and helpful to both of you. You'll see my photo included on this e-mail (I'm wary of robots, so I

always like to send a candid in my e-mails), and my personal cell number.

Please call me anytime with questions, even on the weekend. Here is a link to our website with pricing and community information to help you start thinking about our offerings.

*Best Regards,
Alex*

See how we set our intention, created a personable tone and ended with openness and availability? That's what resonates with your prospect. That's what builds trust and confidence.

Remember, you are making lives better. Reading your short e-mail may be the small moment in their day that makes them feel that they are not alone. What an opportunity that is; embrace the challenge and stay heroic!

DECEMBER 14, 2017

Dear Ask Alex,

One of the challenges I have is leaving phone messages when doing a call out to prospects. Rather than ramble; are there a few short message phrases that you could suggest that are more prospect centered? I struggle with not saying the same thing "Hi, it's me, just calling to see how you and your mother/ father are doing?"

– STEPHANIE IN CANADA

First, I think it's important to say that the nice thing about a prospect-centered approach to sales is that the prospect responds to the totality of the sales experience, not a single interaction, voice message, phone call or tour. Still, there's no question that any call we make out to a prospect is important, whether they answer the phone or not. I believe that "what to say" is easier when I follow these three steps:

1. Remember why I'm calling: Before you pick at the phone, do a little Planning, even if it is just for five minutes. Review what you know about the prospect, something unique about them or related to their readiness stage. What is my purpose for this call? Am I just trying to see if they are ready... do I need more discovery so that I can understand their situation better? Do I have a specific action that I need to take so that I can become trust worthier to them? Do I have a specific action that I want them to take so that they can advance in their process? What do I think will generate an advance for this specific person? If you figure out your purpose and get clear as to how you will communicate it, you most likely won't ramble!

2. Get centered: Take 30 seconds to close your eyes, and get present and confident in your intention for this call.

3. Get present: Practice a bit, and then pick up the phone. Try to close your eyes while you are on the phone. This will help shut out the "noise" around you.

Here are some examples off the top of my head, but use your own words!

"Hello Mrs. Jones!"

I was thinking about you, and realized I had not asked you about

I am curious about whether it might be helpful to you if I sent you those floor plans we looked at? ...

Our conversation really struck me, and I was curious to learn more about where you live, and what you love about it...

I was thinking about how much you are doing for your mom right now, and I wanted to let you know that I am here for you, even if it is just to talk ...

I know you told me that (Thelma) likes to knit, and I was wondering if you would enjoy bringing her to join the Knitting Club meeting next Thursday?

If you know nothing about the prospect just state your name, role and intention. This sounds like:

*"Hello Mrs. Jones, I am Alex Fisher from _____.
I wanted to tell you that I am here for you, to
provide you some guidance if you need it,
regardless of what you ultimately decide.
If you just need to vent or talk, that is ok too.
My intention is not to sell you. I realize that this
process can be overwhelming. Please call me
anytime at _____ or my cell _____. I look
forward to being able to help in some way!"*

Many times 'checking in' is code for "are you ready yet?" As you know, most of our prospects cannot answer that question, and they will certainly assume that you are waiting for the "decision" or the sale. Imagine what they hear: "I want to know if something happened since I last saw you that will make you more likely to need to move" This will not be very helpful to them or improve your ability to build trustworthiness and guide them through change.

Thanks for the question Stephanie! Stay heroic!



OCTOBER 10, 2017

Dear Ask Alex,

Can you give me a few ideas as to how to keep myself and team members “in-check” as we work toward small advances in partnership with our clients versus trying to assert solutions and an Action Plan that the client is likely not quite emotionally ready for today?

–BRANDI AT BALFOUR

Very insightful question, Brandi! I think the mantra for this is, “Slow down so you can speed up!”

There are three steps to the final “close:”

1. **Connect**, build trust and discover.
2. **Untangle** emotions.
3. **Advance** or “close.”

The most challenging step is the “untangling.” If you have done a good job with step No. 1, you are likely to understand the prospect’s stage of readiness, and this will give you a “check” for what commitment or advance you should go for. Crafting your Action Plan and planning conversations based on the prospect’s stage of change is the best way to avoid offering solutions too soon. For example, if your prospect is in the Thinking Stage, trying for the tour or the event may be counterproductive and shut them down. Someone in the Planning Stage may not be ready to hire a moving company but may be more willing join activities at your community.

You can test these when you interact with the prospect and simply ask:

“Mrs. Jones, I wonder if you might be ready to come and take a look at the community next week, or perhaps you would prefer a conversation at home?” or, “Thank you for allowing me to send you some information on realtors in the area. I wonder if you would also see a benefit in us creating a moving plan together?”

It is only natural that our inclination is to jump to the solution. Conversely, it is natural for the prospect to be resistant to such a huge change. We need to become self-aware first of our inclinations and then adjust to what we have learned about the prospect’s readiness. Our job is to gauge their emotional state and gently guide the person towards action. A prospect needs control in a world where all control is disappearing. Slowing down a bit at the beginning of

the process will give them that control over what happens next. Once the prospect feels a sense of trust and control, they will be open to your solutions and everything will seem to speed up!

Stay heroic,



Stay Heroic!