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# SHERPA PROFILES

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## What CEOs and Senior Executive Teams Know About Key Behaviors to Produce High, Sustainable Occupancy

Sherpa is the most sophisticated, purpose-built sales tool in the industry today. We see ourselves as partners in our clients' progress, guiding them through change just as they guide their prospects.

Enclosed within, you can find detailed case studies from best-in-class operators who are Sherpa partners. Sherpa didn't make them successful, their dedication and commitment to building and sustaining a world class sales culture did.



## Professional Insights



### Warren Page

Warren Page started as a caregiver at a nursing home when he began his career. Today, he is the Chief Operating Officer and Partner in Artegan, a medium-sized senior living company based in the state of Washington. Warren spent a number of years in the nursing home industry before going to Atria, a large senior living company, and eventually started his own company with partner, Ronnie Cook.

Warren has had experience with many software programs, especially with Customer Relationship Software (CRMs), which can integrate with clinical, accounting and management information software. Warren addresses the issue many companies face: "It is not easy at first to decide to change your CRM, especially if you need to integrate it with your other software. But it becomes a necessity when you realize that occupancy drives everything. You can have the best clinical care and management systems, but if you don't get to and maintain occupancy well over 90%, you can fail, or at the very least, ruin your equity and debt relationships. Sherpa is so much better at guiding our team's key behaviors that we believed it was imperative to switch, and we already had a leading CRM which many use. Sherpa allows us to teach the

***"It is not easy at first to decide to change your CRM, especially if you need to integrate it with your other software. But it becomes a necessity when you realize that occupancy drives everything"***

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necessary skills and behaviors, and then we are able to do our job as senior managers and hold everyone accountable. Most CEOs and COOs simply do not know the predictive behaviors of high occupancy and thus cannot manage properly. This is a huge error in the industry today, and somewhat shocking that many larger, presumably sophisticated companies, fail so badly at occupancy and thus profitability. Their return on equity could be much higher, and they would have much more satisfied investors.”

Warren also had this insight for CEOs and COOs: “If you think about the root cause of poor occupancy, you must examine your hiring and especially your initial training and the ongoing development of your people. Most of your sales staff spend about 2 hours a day in the productive time of actually engaging meaningfully with prospects. You need to get this number to 4-5 hours per day. Well, most senior leaders can’t, because they don’t have the management tool and the knowledge to know and track the critical behaviors necessary for high, sustainable occupancy. Sherpa thus becomes one of the most important of all tools for senior executives in the company. It provides the critical piece missing from most management teams. I would strongly recommend Sherpa. We see many of our competitors really struggling with occupancy, and we wonder how much longer they can go without Sherpa.”

Please call Warren Page at 360-449-4524. He will be happy to answer any questions you have about Sherpa or sales.



## Professional Insights



### Donald Thompson

Donald Thompson, CEO of Senior Living Communities, (SLC) in Charlotte, NC, is a CEO on a mission. He is one of the very few CEO's in the senior housing field, who personally attends sales and marketing educational events, and has sought to engage with the thought leaders on sales and marketing over many years. SLC is on the top 100 list of largest managers in the field at number 64.

Donald explains: "What I have learned is critical to every CEO in this field: your ED must be your sales leader working with and in your sales team. He or she must be held accountable for occupancy, and the CEO must give them the expert knowledge, personal development and practice skills necessary to achieve 100% occupancy. The ED, sales staff and department heads must know and believe that this goal is achievable, and this is the job of the CEO to impart this culture. It requires time and investment, but this is the most important task of the CEO. The Sherpa CRM is an amazing tool, which helps us manage the sales process in a way we could never do before. The CEO must lead the company, which requires the knowledge and behaviors necessary to produce the ultimate metric or result: occupancy. Occupancy is the metric, because with normal expense management and ancillary revenue initiatives, only occupancy produces more NOI. Sadly, most CEOs are going backwards on occupancy since June of 2016, and I believe they would be well served to adopt Sherpa as part of their strategic management initiatives.

***Sherpa has changed the industry, maybe forever, and those who are not using the PCS approach, are at a competitive disadvantage.***

“The Sherpa CRM helps us focus on the most important leading indicator, which is the number of truly qualified and interested leads who come to visit (or we go to visit) our communities. The sales knowledge and behaviors system built into Sherpa helps us to focus

***“Our results are up since adopting the underlying principles of “PCS” or “Prospect Centered Selling” embedded in Sherpa, and our ability to manage what is most important and have an immediate feedback mechanism for the CEO, COO and Chief Sales Officer to take action is a critical element of why Sherpa is so valuable to us”***

on the critical aspect, by helping us see in what “stage of change” the prospect currently is. We are much more attuned now with Sherpa as to who a prospect is, what they desire and want and how their values and past life experience can be continued at our communities. Sherpa’s framework helps us to truly stay committed to the best process that produces more move-ins per year and thus higher occupancy and NOI.

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valuable to us.

“We also appreciate that David Smith, Alex Fisher and the Sherpa team are fully committed to continue to improve the CRM based upon our feedback and to make it easier to use.

Sherpa has changed the industry, maybe forever, and those who are not using the PCS approach, are at a competitive disadvantage. However, like all initiatives, the CEO must commit and be the leader for the change to stick and become part of the culture. Just buying the software, without a true commitment to change how you sell, will produce limited results, if any.”

Please call Donald Thompson at 704-907-8920. He would be happy to assist you with questions on Sherpa.



## Professional Insights



### Reed Davis

Dial Retirement is the senior living arm of the Dial Companies, which has been around since 1959 as a real estate developer and owner of properties.

Reed Davis is the Director of Sales and Marketing of Dial Retirement. Dial's flagship property had lost 10 full points of occupancy, when Reed and his team adopted Prospect Centered Selling (PCS). Reed explains: "Like most operators, we had far too many leads (some 1200 for this property) and this caused us to spread our valuable time over way too many prospects, which actually hurts your move-in results. You will still get the normal, small number of prospects in the ready or action stage, but it is the prospects in the "thinking" and "planning" stage, which are the ones who will move if you spend time building relationships. The key is to focus on and tap into a prospect's own motivation to achieve the benefits of living in your community. This is a skill that can be learned."

Reed is using nomenclature from the science of how anyone changes their mind from "not interested now", or "not ready yet", to "I am definitely moving in". This description of how anyone goes about the process of changing one's mind on any topic is known as the "Stages of Change" in the behavioral science field. It is a well-researched and empirical discipline, which is part of the Prospect Centered Selling (PCS) approach which underlies the Sherpa database.

Reed tells us what he did next: "We cut the lead base to 120 or by about 90%

*Dial saw their flagship property regain all the lost occupancy in short fashion once they changed the culture to focus on a much smaller portion of the lead base*

in order to focus our time and attention on the best 120 prospects. This is certainly a subjective exercise, but you get much better at this with practice. You don't ignore walk-ins or other prospects ready to move. You simply add them and move them to the top of your

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“Top 10” prospect board if they show buying signals, and certainly someone who walks in has exhibited a strong buying signal.”

Dial saw their flagship property regain all the lost occupancy in short fashion once they changed the culture to focus on a much smaller portion of the lead base. Reed continued with his analysis: “You must commit to the PCS process, which is hard for companies where the CEO, COO and Chief Sales Officer are not all on the same page. You must give the process more than three months, but it will work if you persist and accept no excuses. There will always be 10-15% of the Executive Directors

and sales professionals who will not buy in. You must professionally and charitably ask them to move on (many will leave before being asked) after their second chance to buy-in proves fruitless. If you allow these people to stay, they will make success much more difficult or impossible. This is true of any change initiative, not just changing the sales culture.”

Please call Reed Davis at 412-805-8648 to ask him any questions about sales or Sherpa.



## Professional Insights



### Jason Rock

Jason Rock is the Head of Sales and Marketing for Allegro, a company of 11 properties based in St. Louis, MO. He is one of the most ardent disciples of Prospect Centered Selling (PCS) in the industry.

Jason explains: "We had learned about PCS from David Smith and Alex Fisher many years ago, and we had made PCS part of our culture over a number of years. However, our closing ratio (prospects who have toured once divided by move-ins over a certain period of time such as one or two years) was still stuck at a below average percentage. The Sherpa CRM, since it guides the behaviors of the sales professionals in a much more focused and precise way, was able to dramatically increase our closing ratio. Our closing ratio went up by 50% which is an incredible achievement. So, even though the number of our visits or tours went down by about 25%, we still produced far more move-ins across the company.

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The process works, but you must commit to it. Sherpa gives you the management ability to see and control the key behaviors in a way you cannot do with any other CRM. So, we are the classic proof that while PCS is valuable and necessary, it is not sufficient for maximum results without the guiding arm of the right CRM, which Sherpa clearly is. Sherpa will revolutionize the industry, because it in effect provides the management science and art, the real discipline needed to teach the skills necessary for sustained, high



occupancy. No other CRM does this. Sherpa is truly a unique mechanism. It causes more prospects to move into the action stage, willing to commit and move. This is what is desperately needed in the industry in order to improve and sustain occupancy. It is almost embarrassing how poorly many so-called "sophisticated companies" are doing on the occupancy metric. The root cause is either overconfidence or simply a failure to provide professional management and oversight."

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Jason Rock is also complimentary of the service Sherpa provides: "We have had several ideas to improve the software, and the Sherpa team has been very responsive to make it even better. I highly recommend Sherpa and PCS to all CEOs. You are at a disadvantage without it.

In a certain sense, you don't want all your competitors to have Sherpa, because you know they will become much better, but you also feel badly for them, seeing how poorly many of them are doing. In the end, we see Sherpa

becoming a tool every professional company will have, so we have chosen to be all-in with it such that we will still have a competitive advantage. I believe Tony Mullen, one of the industry pioneers, who co-founded the NIC, said that Sherpa will revolutionize the industry forever. We agree."

Please call Jason Rock at 717-860-7522 if you have any questions about Sherpa and sales..



## Professional Insights



### Sandy Christensen

Sandy Christensen is the Vice President of Operations at Balfour Retirement based in suburban Denver, CO. Michael Schonbrun, the CEO, embraced Prospect Centered Selling (PCS) many years ago, and gave Sandy and her executive team the authority and freedom to execute it. Sherpa was a natural extension, since its main objective is to guide the expert knowledge of PCS into daily behaviors, which cause high occupancy. Balfour was one of the very first users of Sherpa.

Sandy recognized that the PCS process is the underlying genius of Sherpa, and her team is constantly using the coaching center and the tutorials contained within Sherpa. Sandy explains, "Because the Sherpa CRM now allows us to examine and measure the key behaviors of our team members that we know produce better move-in results, we can concentrate the time and resources of our corporate team on what really moves the needle, instead of spending so much time on examining, auditing and reporting. Now we are able to spend far more time on coaching and helping people practice the key behaviors. This allows for more true care and concern for our team, who appreciate the investment we are making in their personal development and in their success with us. The science of the connection between a caring culture where time and money are invested in the skills, which will help team

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members to be successful, has been empirically proven. So, we truly believe that Sherpa has helped our culture to be even better than it was. Our turnover of sales professionals is quite low, and this is necessary to have sustainable, high occupancy.”

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Sandy also knew of the critical relationship between the Executive Director (ED) and the sales team and the need to have the ED be the sales team leader. Sandy describes this approach: “The ED spends about 15% of their time directly involved in sales activity, including prospect visits. The ED leads the daily stand-up meeting and will help in brainstorming creative follow-up to build our relationship with our top 10 prospects. We believe the ED is a critical component of sustainable, high occupancy. We are in some very competitive markets, so we must be better. Sherpa allows us to be better. It indeed is a key part of our culture. I

would definitely recommend it to anyone in our field, but they must believe and adopt PCS as their culture, or they will not produce the type of change and move-in results that we have had.”

Call Sandy Christensen at 303-926-3856, if you have any questions.



## Professional Insights



### Tammy Sunderman

Hearth is one of the largest senior living operators based in New York state. Dan Suits, the Chief Operating Officer, recognized the importance of focusing more on the key predictors of occupancy many years ago. He charged Tammy Sunderman, head of Sales and Marketing, to learn about Prospect Centered Selling (PCS). Tammy studied it carefully over several years and realized it was the most powerful, empirically based system for high, sustainable occupancy which she had ever seen. She quickly saw the inherent errors in a “volume and velocity” approach (making as many calls as possible to a large database of names in order to try and set appointments for tours).

Tammy gives us this insight: “Prior to PCS and Sherpa, we did not have a way to measure, so we did not have specific goals and objectives for our sales team, other than, make as many calls as possible. We now focus on a much smaller number of leads, and we know to teach and measure the amount of time spent with our best leads, especially in completing a detailed prospect case study.

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“In addition to allowing us to know and measure the most important predictive skills and behaviors, we find something new in the Sherpa CRM on a regular basis that helps us get even better. Virtually all CRMs simply help capture and report your data; they do not help you get better at selling and producing more move-ins. This is the genius of Sherpa. While it does everything that a CRM can and should do to capture,

analyze and report your data, it shows you what you must prioritize and do. It teaches you and gently coaches you to adopt the right behaviors. These behaviors

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are currently used by only the very top sales performers. Sadly, 95% of all sales professionals in senior living do not know any of these skills and behaviors. If you ask them what Motivational Interviewing is, they would not know or maybe feign like they do. We did not know them either, until we learned PCS from David Smith and his team.”

Tammy gives compelling evidence for the results which Hearth has achieved with Sherpa: “This past December (2016), we had our best December in the history of the company. We were up 30% over last December! Since the industry had a mediocre fourth quarter, we attribute the majority of this gain to PCS and Sherpa. I would simply tell CEOs and COOs that you are at a competitive disadvantage without

Sherpa.”

Please call Tammy Sunderman at 317-306-6785 if you have any questions about PCS or Sherpa.



## Professional Insights

### Victoria Hess

Victoria Hess is the Vice President Sales and Marketing for one of the largest, non-profit Senior Living providers in the Mid-Atlantic . They manage almost 2,000

Independent Living units plus another 2,500 in tax credit housing, personal care and skilled nursing. Presbyterian Senior Living has been serving older adults for more than 85 years.

*. If one truly believes in a person-centered mission, why would we not treat our prospects the way we treat our residents and their families? So, adopting PCS was a natural extension of our mission, and the Sherpa CRM was a logical and necessary step to execute our PCS approach. It did not make sense to continue with a CRM that did not dramatically enhance our ability to sell .”*

Victoria knew that connecting deeply with prospects would make an extraordinary difference in helping people find their own motivation to move. She explains: “Our non-profit mission focuses intently on caring for seniors , and especially how to plan and deliver that person-centered care and service. So, we realized that Prospect Centered Selling (PCS) was in essence the exact same process of caring, but instead, with our prospects. If one truly believes in a person-centered mission, why would we not treat our prospects the way we treat our residents and their families? So, adopting PCS was a natural extension of our mission, and the Sherpa CRM was a logical and

necessary step to execute our PCS approach. It did not make sense to continue with a CRM that did not dramatically enhance our ability to sell .”

Victoria further explains: “We recognized that the Executive Director should be the occupancy and sales leader, and our natural approach is one of counseling, so having the captain of the ship take the lead sends a powerful signal to all team members as to what is important and on what we must focus our time and our skills.

Alex and her team have provided education directed specifically to the leadership of our communities. In doing that they have reinforced the selling zone, what it is and how it should be managed, as well as how to use Base Camp, Top Ten, and Planning Case Studies in their leadership roles.

In addition, Sherpa allows us to measure what really matters. Most companies can not do this, and so they instead try to measure things such as number of call outs, which do not predict high, sustainable, conversion rates nor occupancy. Sherpa allows us to measure and manage what actually drives sustainable, high occupancy. “Sherpa is not just a CRM. We are finding it to be an effective sales management and skill development tool. We are pleased with the difference it is making in our sales process and I encourage others to explore how their occupancy can also be positively impacted by Sherpa.”

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Please contact Victoria Hess at 717-439-0479 if you have any questions about PCS or Sherpa.



## Professional Insights



### Theresa Achatz

Theresa Achatz is the Vice President of Operations and Sales at Generations, a family-owned company based in Oregon. Generations consistently has occupancy above 95%, and credits Prospect Centered Selling (PCS) and the Sherpa CRM with helping to get to and stay at this high occupancy rate. Theresa explains: “We had one property that was a constant struggle for us with occupancy in the 85% range, but once we adopted PCS and employed Sherpa, this property is now consistently at 95%.”

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Theresa also has these important insights: “Creating the Prospect Case Study is a key driver of the right behaviors. We must start with asking detailed, caring questions about who the person is. When sales professionals have to share case studies of prospects with those on the team (Executive Director, Move-In Coordinator and other sales professionals) which we require, it creates a habit of doing the proper interview or discovery. It does take a certain number of interviews and practice before the skill is mastered, but we can see the

*The willingness and the ability of our sales teams to do home visits with prospects is a key predictor of occupancy for us.*

direct correlation to results. Without the right time and skill, the prospect case study is too shallow to result in a relationship being started, and it prevents the meaningful creative follow-up, which is so important to building a trusting relationship.”



Theresa also shared this insight, which is also at the heart of the PCS science: “The willingness and the ability of our sales teams to do home visits with prospects is a key predictor of occupancy for us. The communities which have more home visits have higher occupancies. How to professionally and prudently conduct home visits, including unannounced ones, which require greater care, is a skill one learns and masters as part of the PCS process and which Sherpa tracks.”

The Generations corporate team has seen that the amount of productive selling time definitely goes up once PCS and Sherpa became part of the culture. This is the key driver of sustainable, high occupancy.

Theresa had this explanation: “To see our team members spend five hours every day in the “selling zone”, and enjoy it, is an incredible achievement. We know it works and we would never go back to the old, standard way of dialing as many calls as one could make in a day trying to strong-arm people into tours. The old approach burns out sales professionals and is a huge turn off to prospects who then seek to avoid you.”

Please call Theresa Achatz at 503-652-0750 if you have any questions about PCS or Sherpa.



## Professional Insights



### Kelley Reed

Kelley Reed is head of Sales and Marketing for Ascension Senior Living (Ascension), one of the largest non-profit health system providers in the country.

A former veteran of Sunrise Senior Living and Lifespace Communities, Ms. Reed has played an instrumental role in marrying a unique combination of systems, cultures and missions under the greater Ascension umbrella. Kelly explains: "Ascension is not yet well known outside of the acute care hospital sector, where we are the largest non-profit health system in the United States, but we believe that will begin to change very soon. Dr. Kevin O'Neill, former Chief Wellness Officer at Brookdale, recently joined our team, and we believe that will have an impact, as will our continued growth. We have very ambitious growth plans since 80% of our acute care hospitals do not have Ascension nursing or assisted living communities to which they can refer.

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Kelley knew that she must immediately put in place one foundation for all key systems and processes, and she knew sales and marketing was critical since many of the communities merged were still using "pads" to collect resident data (notepads not iPads!). While she had been leaning toward the Salesforce CRM, she came to realize through the company's due diligence, that Salesforce was not necessarily aligned with Ascension's mission and values, and

thus began to explore other options. It was here that she was struck with insight. Kelly further explains: "I had just moved to St. Louis and I received this incredible welcome package with a lovely, hand-written note from one of the Sherpa owners. I was deeply touched with the

expression of genuine human kindness. This caused me to look into Sherpa and I was convinced. Sherpa was the only CRM that I saw that would allow us to fulfill our culture by treating each prospect as a resident in the making; and it was the only one I knew that Dr. Kevin O'Neill would pick for his optimization of life approach, which he has brought to Ascension Communities."

Given that 60% of Ascension's total unit count was licensed as skilled nursing, Kelly brought forward a request to the Sherpa team to extend the platform's capability to health care influencers and referral sources. The result of that request the Sherpa's new Clinical Companion, which is now implemented at the Ascension Communities.

Ms. Reed elaborates: "We knew that to truly have an advantage and reach our objective of 70% of our nursing residents coming from referrals, we needed the Sherpa approach in our nursing business. The team members of Sherpa always have a positive approach to seemingly insurmountable problems. Perhaps this is one of the reasons why Sherpa is becoming a revolution in results for our industry. Great things usually happen for great people. Virtually everyone I know feels this way about the Sherpa team."

If you have any questions about Sherpa, please call Kelly Reed at 412-805-8648.

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## Professional Insights



### Steve Benjamin

Steve Benjamin, CEO of Validus Senior Living, has seen a thing or two in our industry. He previously held senior positions at Beverly, Hillhaven, Sun Health, Senior Lifestyles and was the president and COO of Horizon Bay. At Validus Senior Living, Mr. Benjamin is on a very fast pace with nine communities opened in the last three years and seven more in development.

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Steve has learned that excellence requires creating raving fans, and to do that requires consistency in execution. He explains: “We named our communities ‘Inspired Living’, because we believe that creating raving fans, customers and families, who truly appreciate what we do, inspires our employees as well as our residents to reach for more.”

Validus recently entered into a relationship with the NFL Alumni Association (NFLAA) to develop a number of assisted living/memory care communities, which would serve retired players with memory care needs. The communities will be open to the public and are not exclusive to the players. Joe Pesarchek, president and CEO of NFLAA, stated: “We were impressed with Validus Senior Living and its ‘Inspired Living’ brand of communities and know they will exceed our retired players’ needs.”

Due to his long tenure in the field, Steve particularly understands the need for excellence in sales and marketing, especially due to the

potential slower lease-up many new communities experience today compared to the early to mid-1990's. Steve explains: "Because a CRM is now so critical to marketing, and especially to sales success, it did not make sense to stay with the old-line CRMs. We wanted to be certain that we give our sales and operational teams at each property the very best CRM, which could also help them become better educated and better skilled in the behaviors, which lead to higher conversion ratios and higher occupancy. We believe Sherpa gives us that important edge. We really like the fact that it aligns our sales and operational teams on what we seek to measure and reward. Sherpa teaches our teams to focus on building relationships based in trust."

Steve also appreciates the fact that Sherpa comes out with regular updates to the software to incorporate client ideas to make it even easier to use and more tailored to specific requests. He added: "Our team appreciates the personal service and training we receive. You are dealing directly with the owners in many cases. This is rare."

If you have any questions about Sherpa, call Steve Benjamin at 813-330-2660.

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