

In transactional selling, there are only two possible outcomes with your prospect. Either you get a sale or you don't. New inquiries are considered "hot" leads, while prospects you haven't heard from in a while go "cold."

With Prospect Centered Sales, prospects are categorized by the Stages of Change (Denial, Thinking, Planning, Action), which highlights their readiness to accept change based on verbal and emotional cues. By observing these cues, we can measure whether our sales efforts are helping a prospect advance or not. We measure our prospect's progress by recording an outcome to each sales activity.

OUTCOMES FOR SALES ACTIVITIES

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|--------------|--|
| Sale | the result of a call or visit where the prospect agrees to move. They are ready to accept change. |
| Advance | the result of a call or visit where the prospect agrees to an action, or makes a commitment, that moves them closer to a decision to move. They advance in their readiness to accept change. |
| Continuation | the result of a call or visit where the prospect avoids an action or commitment, but doesn't communicate an outright "no". This is the opposite of an advance. |
| Lost Lead | the result of a call or visit where the prospect moves elsewhere, or asks you to cease contact. |

Prospects progress more consistently when we strategize our next steps and plan for advances, rather than reactively accepting continuations. As advances accumulate, prospects become ready to accept change and move.

EXAMPLES OF ADVANCES

- Permission to speak with a prospect, influencer or adult child.
- Breakthrough conversation with discovery and/or gained trust.
- Agree to receive Creative Follow Up.
- Schedule a tour or a home visit.
- Agree to join an event or have lunch with a resident.
- Agree to look at paperwork or finances together.
- Create a "furniture plan" or "moving plan".

TIPS FOR ADVANCES

- State your Intentions – you're here to help, not sell.
- Align, build trust and set the stage for guiding a change through empathy.
- Discuss Life Stories and listen for themes and values to compare to current living situation.
- Validate and clarify concerns. Explore the outcomes of staying home rather than make a move.
- If there are negative outcome to remaining home, help prospects lead the conversation for solutions.
- Request support from family, friends and influencers.
- Think small steps: get a commitment for something that gradually moves them forward.

PROSPECT CASE STUDY

Schedule a “next step”. Organize a strategy to get an “advance”.

Who is the Prospect?

Review the Prospect’s biography notes: Life Story, Legacy/Themes/Values, Typical Day, Health, Financial, Adult Children.

Advantages & Disadvantages of Staying

Consider the Advantages of the Prospect staying where they are (Mermaids), and the Disadvantages of the Prospect staying (Alligators / Motivators).

Advantages & Disadvantages of Moving

Consider the Disadvantages of the Prospect moving to a senior living community (Risks / Objections), and the Advantages of the Prospect moving (Treasure / Preferences).

Next Step

How can we help the Prospect advance in their readiness to accept change?

DENIAL
That which if I move, I will lose.

"I love my home. I am never leaving."

KEY QUESTIONS:

- What do you love most about your home?
- What are you most proud of in your life?
- Why might you consider moving?

THINKING
Aware of problems that make it difficult to stay home.

"I wish they would just go away."

KEY QUESTIONS:

- Are you sure you can't stay?
- Have you considered installing a chair lift?
- Is it really as bad as you think?

PLANNING
Fearing the risks and difficulties of moving.

"What would I do with all of my stuff?"

KEY QUESTIONS:


- What do you fear most about moving?
- What about downsizing concerns you the most?
- How do you feel about living with other people your age?

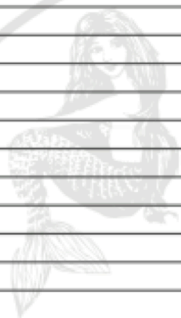


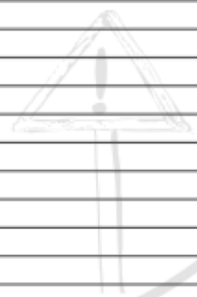
ACTION
Ready for the benefits of services and amenities.

"I am ready to choose a community."

KEY QUESTIONS:

- What features are most important to you?
- What did you like best about the community?
- Where else are you looking?



| DENIAL PRO STAY | THINKING CON STAY |
|--|---|
|  |  |
| ACTION PRO MOVE | PLANNING CON MOVE |
|  |  |

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Planning for Advances Worksheet

| Ideas for the Next Step with your Prospect | What is the likely outcome? | Is it easy or difficult to achieve? | Rank these ideas | Creative Follow Up: How can I present this idea in a creative or personalized way? |
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Possible Outcomes:

S = Sale

A = Advance

C = Continuation

L = Lost Lead