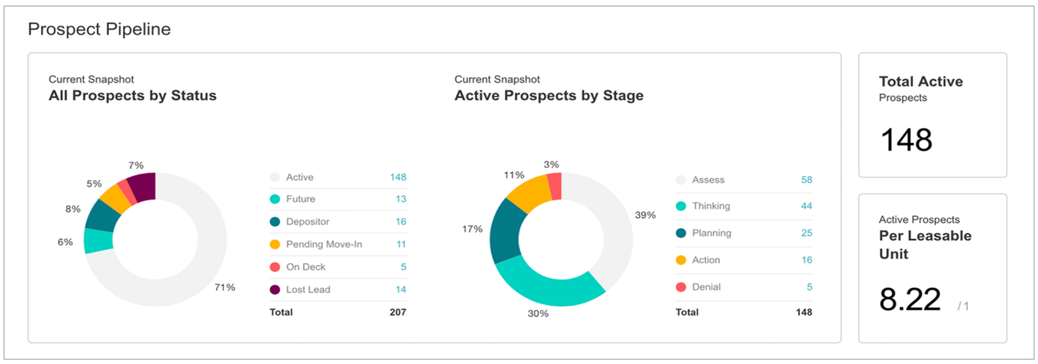
Identify Sales Opportunities & Improve Sales Behaviors

In Senior Housing sales, the key to better results is to improve the *quality* and *effectiveness* of your sales activities, rather than just increasing the *quantity*. Through Sherpa, you record data relevant to each sales interaction, allowing you to measure not only what was done, but how it was done. Sherpa's Dashboards aggregate these measurements to help you identify sales opportunities and improve sales behaviors, allowing for better connections, strategies to advance, and ultimately improved results.

KNOW THY LEADS



Prospect Pipeline

What's the status of your lead base? Considering the average sales counselor can work about 50-60 leads per month (at 2 hours TSZ/lead), are your sales efforts diluted by too many leads?

If so, consider reducing the size of your active lead base by moving non-responsive ACTIVE prospects to FUTURE status. If FUTURE prospects responde to your marketing, change their status back to ACTIVE. This will keep your active database focused and productive.

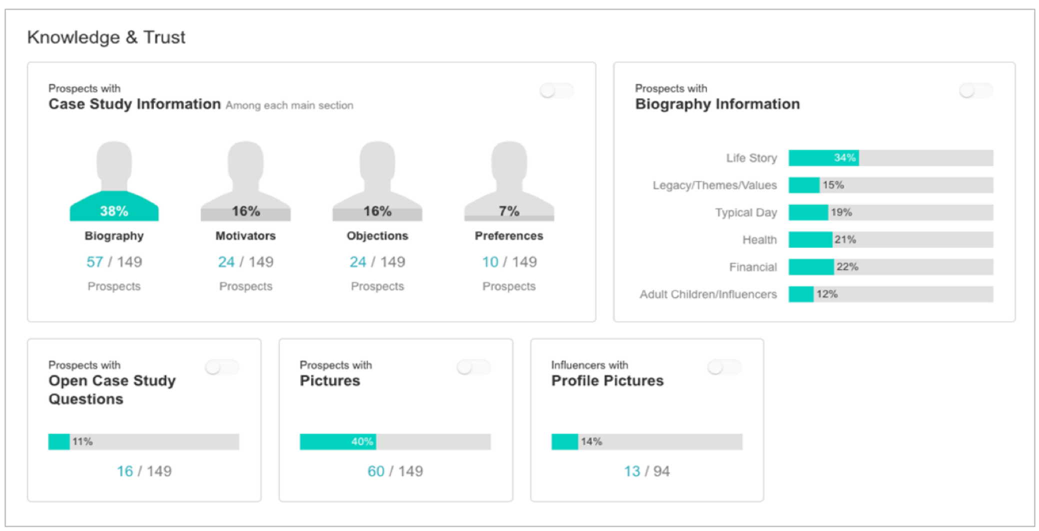
Do we know where our ACTIVE prospects are in their stage of readiness? By default, new leads have a stage of "assess", meaning we need to assess their readiness through good discovery.

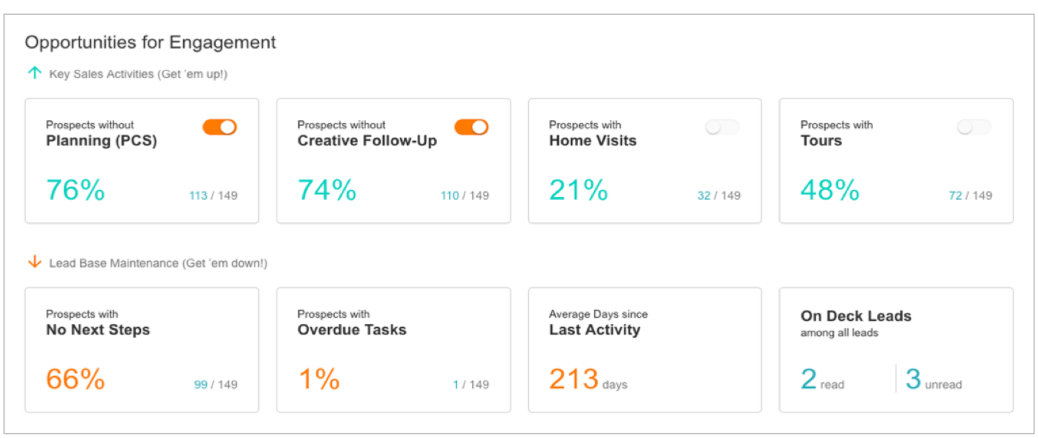
Knowledge & Trust

Use the ACTIVE PROSPECTS filter to view different segments of your lead database. Such as:
- Top 10
- Prospect Worked (then select a timeframe)
- New Inquiries (then select a timeframe)

Each tile on the screen has a TOGGLE to view the positive or negative value. Such as:
- Prospects *with* or *without* Pictures
- Click the number to view the list of prospects. This list can be exported to an Excel file.

The Knowledge & Trust tiles allow you to see how well you are discovering and journaling about your prospects.
- How well do we know our prospects?
- Are we identifying new questions for discovery?
- Do we have photos of our prospects and influencers that will help us engage with them and remember them?



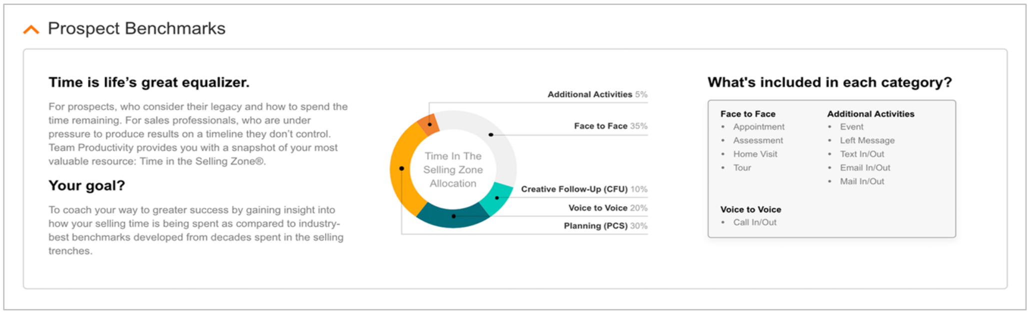


Opportunities for Engagement

Key Sales Activities are metrics you want to be HIGH.
- Planning: Are we planning strategies to get advances from our sales activities?
- Creative Follow-Up: Are we following up in a personalized way that demonstrates empathy?
- Home Visits: For the majority of our leads, their home is our greatest competition. Have we visited?
- Tours: Are our new tours leading to return tours?

Lead Base Maintenance are metrics you want to be LOW.
- No Next Steps: Do we have prospects without a scheduled next step?
- Overdue Tasks: Are we staying on top of our scheduled tasks?
- Last Activity: Are we able to maintain regular contact with our prospects?
- On Deck Leads: Do we receive online leads from a Community Website, Referral Agency or Marketing Automation? View the "On Deck Analysis" report to gauge the value and quality of these leads.

TEAM PRODUCTIVITY



Prospect Benchmarks

For sales professionals, who are under pressure to produce results on a timeline they don't control, Team Productivity provides you with a snapshot of your most valuable resource: Time in the Selling Zone.

Coach your way to greater success by gaining insight into how your selling time is being spent as compared to industry-best benchmarks developed from decades spent in the selling trenches.

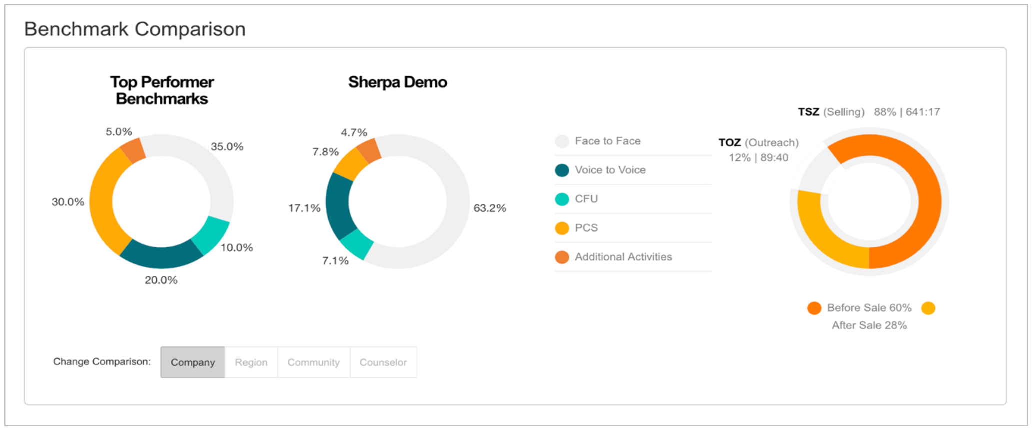
Benchmark Comparison

The first graph shows Top Performer Benchmarks, while the second graph allows you to compare how segments of your Company are allocating their Time in the Selling Zone.

Use the CHANGE COMPARISON filter to view different segments of your Company. Such as:
 - Company, Region, Community, Counselor

For each segment of your company, the third graph shows the portion of time being used for Time in the Outreach Zone versus Time in the Selling Zone.

Furthermore, Time in the Selling Zone is separated into TIME BEFORE THE SALE and TIME AFTER THE SALE. This is extremely valuable to see how Move-In Coordination is constraining your selling time for other sales activities.



Company Totals

	Prospects Worked	Time in the Selling Zone Allocation: Face to Face	Voice to Voice	Creative Follow-up	Planning (PCS)	Additional Activities	Total TSZ (HH:MM)	Average TSZ per Prospect	Outcomes: Advances	Deposits	Sales
Leads Worked Total	153	160 232:47 **65.75%**	182 51:50 **14.64%**	61 23:45 **6.71%**	103 29:45 **8.40%**	75 15:55 **4.50%**	354:02	– –	115	5	63

Shady Pines

	Prospects Worked	Time in the Selling Zone Allocation: Face to Face	Voice to Voice	Creative Follow-up	Planning (PCS)	Additional Activities	Total TSZ (HH:MM)	Average TSZ per Prospect	Outcomes: Advances	Deposits	Sales
Matt Leonard Sales Associate	32	45 60:50 70.26%	31 9:25 10.88%	16 9:05 10.49%	28 5:05 5.87%	7 2:10 2.50%	86:35	2:42	28	1	9
Elena Berkery Sales Director	43	38 42:20 60.62%	47 11:35 16.59%	21 5:50 8.35%	30 9:25 13.48%	11 0:40 0.95%	69:50	1:37	34	1	7
Brie Ramsey Move-in Coordinator	43	49 68:57 60.33%	47 19:50 17.35%	27 7:50 6.85%	39 10:55 9.55%	11 6:45 5.91%	114:17	2:39	43	1	16
Henry Binning Executive Director	8	6 10:00 73.62%	7 3:00 22.09%	2 0:15 1.84%	7 0:15 1.84%	1 0:05 0.61%	13:35	1:41	5	1	0
Leads Worked Total	77	120 182:07 **64.06%**	124 43:50 **15.42%**	54 23:00 **8.09%**	89 25:40 **9.03%**	29 9:40 **3.40%**	284:17	– –	94	3	26

Company Totals

Dig into the aggregate numbers behind your Company Totals and their Outcomes.

Consider two benchmarks:

BENCHMARK: 4 hours per sales counselor per day in the selling zone.
- Are we spending at least half of our working hours in the Selling Zone? If not, how can we reorganize responsibilities to protect the selling zone?

BENCHMARK: 2 hours in the selling zone per lead.
- Are we spending enough time on each prospect to help them advance, or are we spreading our time across too many leads and diluting its effect?

You can TOGGLE between Prospects or Outreach Contacts at the top of the page.

Community Details

Dig into the aggregate numbers for each community and its sales team. Consider the benchmarks provided under Company Totals.

Click the numbers to view the lists of prospects, activities, time and outcomes. These lists can be exported to an Excel file for easy reference.

You can TOGGLE between Prospects or Outreach Contacts at the top of the page.

BASE CAMP

Top 10
Hover over each Top 10 prospect for a summary of recent sales notes and scheduled next steps.

Do all your Top 10 prospects have a Next Step with Strategy for an Advance? If so, are any of the Next Steps past due?

On Deck
Have you followed up and qualified your On Deck leads?

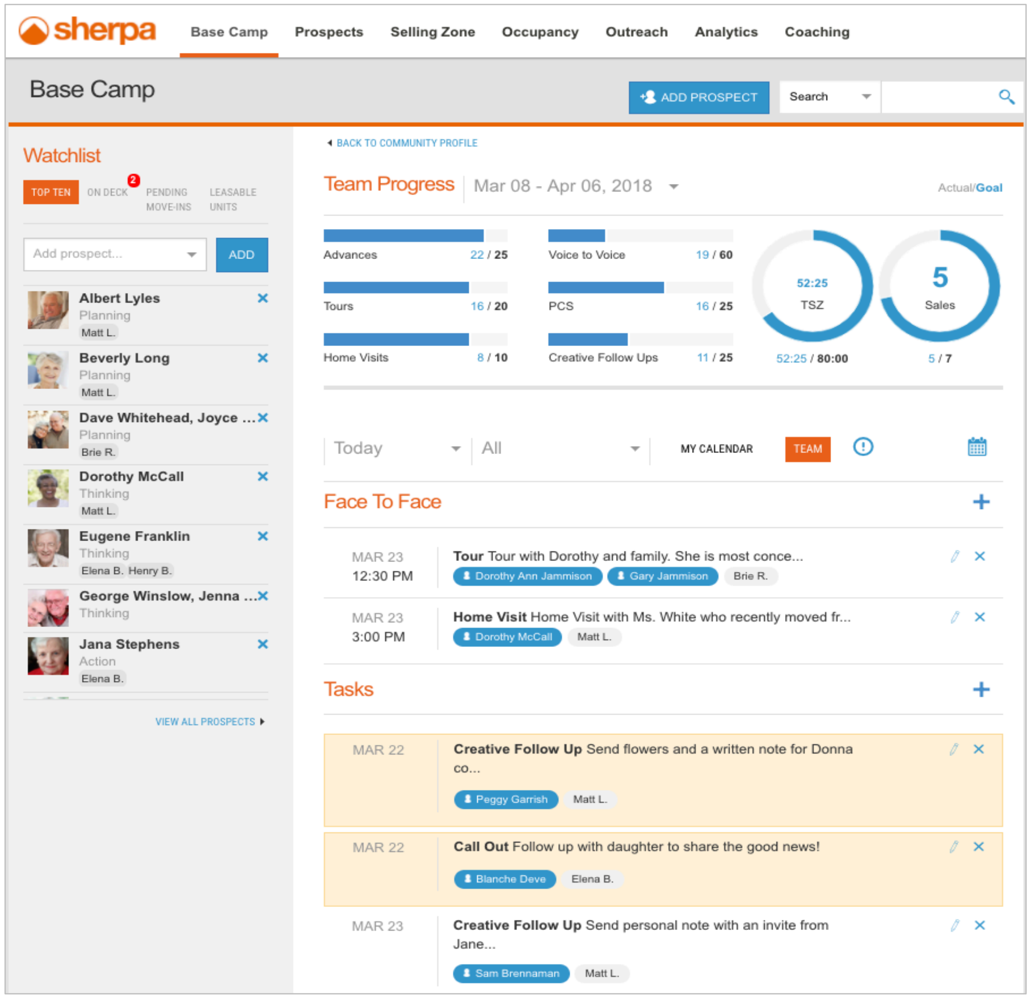
Sales Goals for Team Progress
Are you breaking down your occupancy targets into measurable goals for move-ins and sales activities? Planning, CFU, Tours, Home Visits and Advances are the Leading Indicators for Move-ins.

Suggestions from Best Performers' data:
- 4+ TSZ hours per leasing counselor per day
- 3 Advances per sales team per day
- 3 Planning sessions per sales team per day
- 3 Creative Follow Up per per sales team per day
- 2+ Home Visits per sales team per week
- 5+ Tours per week per sales team per week

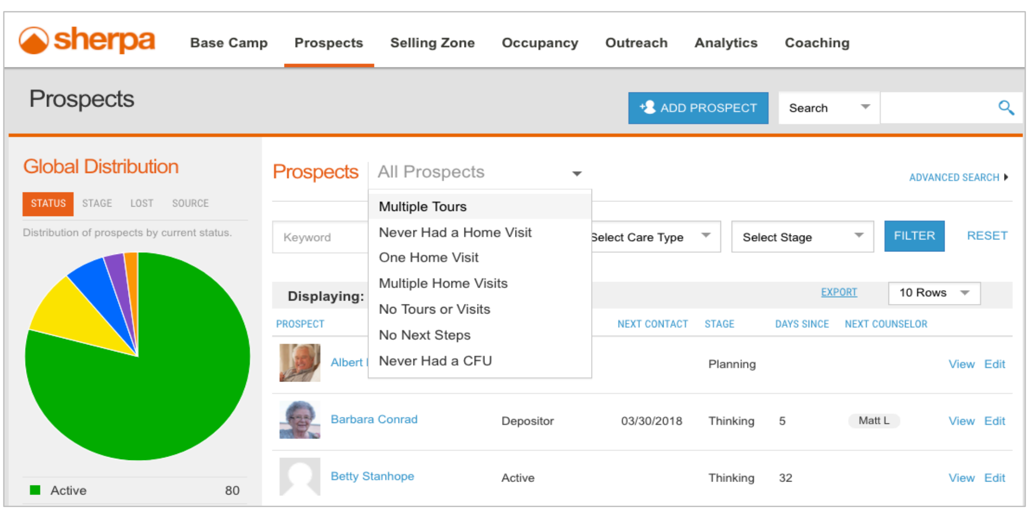
Tasks
Stay current with all scheduled tasks. Overdue tasks can mean opportunities for advances are falling through the cracks.

At the bottom of your TASKS, click LAST to go to the end of your task list. Assure that you complete all tasks scheduled today, then work backward through your tasks by completing or rescheduling them.

It does no good to plan next steps if they remain undone on your calendar. See "Prospect Pipeline" under the "Know Thy Leads" section for additional suggestions.



PROSPECTS



All Prospects filter
Identify sales opportunities by clicking ALL PROSPECTS and checking the available filters.
Some good ones are:
- Multiple Tours or One Tour
- Multiple Home Visits or One Home Visit
- Never Had a CFU, etc.

Prospect Status & Stage filters
Another way to identify sales opportuninties is to use the STATUS and STAGE filters.

Select ACTIVE as the status, then select ACTION or PLANNING as the stage. Click DAYS SINCE to sort the column.

Look for prospects that haven't been contacted recently, or prospects that don't have a next contact. You can export your list for easy reference.