



SENIOR HOUSING & HEALTHCARE SALES TRAINING

ZERO LOST REVENUE DAYS

Facilitator's Guide

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Facilitator's Introduction

Prepare Yourself to Teach this Content

Read or re-read *ZERO Lost Revenue Days*. Re-familiarize yourself with the content. The structure and content of this training follows the book faithfully in these six parts:

- Introduction to create motivation: Review goals and build awareness of the need for this training (changes in industry, competition, comparison to their current results, etc.). Overview the five systems needed to change results and why each individual would want to change results (WIIFM for participants).
- Teach: Creating a Profitable Call Management System.
- Teach: Revising the Inquiry System
- Teach: Evaluating and Changing the Visit System
- Teach: Improving Follow-Up and Closing Systems
- Teach: Mastering the 100% Occupancy System

Stories & Examples

Periodically you will have opportunities to add your own stories and examples to this content to make it more relevant to your participants and provide more energy to the discussion.

Recommended Wording and Training tips

Some elements of the BILD program should be delivered verbatim, or through a certain process or in a particular order. When that occurs, there will be a facilitator's note to use the language or process verbatim.

- Some facilitator's notes will appear in brackets: **[Like this.]**
- Content to be used verbatim will appear in italics: ***Like this.***

Using PowerPoint

A purple rounded square icon with a white border containing the text "PowerPoint" in white.

PowerPoint

A PowerPoint deck has been provided with this training. Please do not change the existing PowerPoint slides, although you can add additional slides of your own.

This is an experiential and interactive training. **The PowerPoint slides contain minimal content.** The purpose of the slides is to help you keep your place in the training, and to provide an extra mode of instruction for key points you want to emphasize. It is not designed to substitute for thorough preparation in the content.

Pair & Share

A circular orange icon with a white border containing the text "Pair & Share" in white.

Pair & Share

Periodically you will be asking participants to engage one another in conversation. The shorthand name for this is “pair and share.” It means that you’ll ask two participants to turn to one another and answer a question you’ve put to them. This is an excellent and easy way to raise the energy in the room, especially after you’ve just given them a lot of food for thought.

Activity

A circular red icon with a white border containing the text "Activity" in white.

Activity

Each activity will start with a description of the purpose for the activity, followed by detailed instructions. Before beginning any activity, be sure to explain the purpose and instructions. This gives your participants a framework for understanding what to do and why.

Interaction

A circular blue icon with a white border containing the text "Discuss" in white.

Discuss

Periodically the content will set up an opportunity for a discussion between the facilitator and the participants. Similar to a pair & share, only this conversation takes place between the facilitator and participants for the benefit of the whole class.

Workbook

A green parallelogram icon with a white border containing the text "Workbook" in white.

Work-book

Sometimes the activities will involve participants in filling out their workbooks. When the workbook will be used in an activity, the workbook icon will be included.

Teaching time

This content has been designed to be delivered in approximately seven hours of teaching time, according to the following schedule:

9:00 to 10:00	Chapter 1: Introduction Chapter 2: The Call Management System Chapter 3: The Inquiry System ❖ Steps 1, 2
10:00-10:05	MORNING BREAK 1
10:05-10:50	Chapter 3: The Inquiry System ❖ Step 3, 4
10:50-10:55	MORNING BREAK 2
10:55-12:10	Chapter 4: The Visit System
12:10-1:00	LUNCH (50 min)
1:00-2:35	Chapter 5: The Follow Up System (Part 1) 40
2:35-2:40	AFTERNOON BREAK 1 (5 min)
2:40-4:10	Chapter 5, continued: The Phone System
4:10-4:15	AFTERNOON BREAK 2 (5 min)
4:15-5:00	Chapter 6: Review 100% Occupancy System & Wrap Up

Beware of time-wasters, such as getting a late start, not monitoring breaks, and allowing activities and discussions to go on too long.

Introduction

1

Create Motivation

Purpose	This section is to warm up the participants, establish the context for the workshop and give participants a chance to explore “what’s in it for me” (WIIFM)
Timing	15 minutes.
Contents	<ul style="list-style-type: none"> • Provide Background <ul style="list-style-type: none"> ○ Warm up Activity: WIIFM • Preview Session Goals

Provide Background

5 Minutes

- 1. Open with a brief introduction, if necessary, about yourself.**
- 2. Explain the various industry statistics and reasons for today’s training:**
 - The reason you’re using BILD training. [Review Slide on BILD results in the industry]
 - The methodology of the mystery shopping tour. [Review slide]
 - Industry information [Update information if you have new data.]
- 3. Transition:**

That’s what’s going on in the industry. Now let’s turn our attention to our community and you.

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Warm-up: WIIFM (What's in It for Me?)

5 minutes

4. Explain:

You're here working at this senior community for a reason. Perhaps it was the only job you could get, but more likely you **chose** the job you have now. In some way, it serves your personal goals.

5. Ask:

- I know you know a lot about this community. You see things. So, just for fun, what if I were to give you THIS senior living facility. What is the first thing you would do to increase occupancy?
- [Give those 10 seconds to mull it over, then instruct them to **Pair & Share** — discuss **their answers with one another**. Allow just 60 seconds.]
- **Debrief:** Ask for a few shares. Do not evaluate the shares! After a few shares, use those ideas to launch into a presentation of the goals of this session.



Preview Session Goals

5 minutes

6. Explain:

100% occupancy is an important goal for both personal and business reasons.

A senior living facility is a community of workers as well as a community of residents. In order to protect both communities, the occupancy rates need to be at or close to 100% and maintained there. You've made some suggestions for getting there. Let's see how your suggestions match the BILD systems that you'll learn in this workshop.

7. Present the systems:

Connect your introduction of each system to some of the points they raised in the WIIFM question above. **Do not spend any time discussing these in depth right now.**

- 1) Eliminate Mismatched Calls and Capture Lost Business using a Profitable Call Management System



- 2) Re-Invent the Inquiry System & Convert 75% of All Inquiries Into an On-Site Visit.
- 3) Revolutionize the Visit System & Create a Memorable Personal Experience that Results in Sales.
- 4) Fuel your follow up with a Follow Up System that puts you ahead of the competition.
- 5) Cut the Sales Cycle in Half, and Close those Hot but Challenging Leads by using a powerful Closing Process.

[Note to facilitator: The content in ZERO Lost Revenue Days contains four systems: Call Management, Inquiry, Visit, Follow Up & Closing, and 100% Occupancy. This workshop focuses on skills and processes. The follow-up and closing section is by far the longest because it focuses on skills. The final system (100% Occupancy) has been shortened and acts as the summary.]

The Call Management System

2

Eliminating the Mismanaged Call

Purpose	This section briefly overviews the problems and solutions with mismanaged calls. It references creating a Backup Team, but does not focus on going through the process of creating one.
Timing	15 to 25 minutes (if you do the optional activity).
Contents	<ul style="list-style-type: none"> • What is our “face to the customer?” • A system for eliminating mismanaged calls <ul style="list-style-type: none"> ○ Optional activity—form a backup team

What Is Our “Face to the Customer?”

5 Minutes

1. Explain:

[Pose the following scenario, then ask the follow-on questions below.]

Suppose your elderly mother is a couple of years away from moving, but you want to start now looking for the right place. You want your mother to come with you and tour several facilities.

*You choose **five** places off the internet that are within your area of the city. You sit down and start calling to speak to their counselors and arrange a visit to each.*

- How many sales counselors would you expect to speak with?
- How many appointments would you expect to set?
- What do you think research shows actually happens?

[Accept a few guesses for each question, without evaluating answers.]

2. Explain:

Research actually shows that 2 out of 5 inquiry calls are mismanaged. That's 40% of all inquiry calls!

3. Define the mismanaged call:

According to Bild & Co, chances are that a sales counselor will not be available and the receptionist won't know how to convert the caller to an appointment, or won't even try. The caller will be directed to a voice mail or asked to leave a message. No lead information will be collected, and ultimately, the lead will be lost.

A System for Eliminating Mismanaged Calls

10 minutes



4. Overview the call system:

The four-part system for eliminating mismanaged calls consists of:

- 1) Create a sales centered culture where the customer is the priority.
- 2) Create a backup team hierarchy three deep for each day of the week, during the day and fully train your night and weekend staff.
- 3) Train your **Back-Up Team**.
- 4) Implement systems for measuring to make sure the system is working the way it should.

[Let participants know that they won't be creating the back-up team in this workshop, but you want them to be aware of what such a system would entail.]

5. Explain typical 'over the wall' sales culture:

The typical sales culture in our industry is what's called 'over the wall.' That means we toss the problem over the wall and don't see where it lands.

For instance, typically the ED is heading up operations and has no idea what sales is doing, the activities director is handling programming and interacting with residents, the chef is focused on food preparation, and so on. Everyone is doing their best, to be their best—but on their own!

6. Explain sales-centered culture:

The key to a Sales-Centered Culture is one in which more than just the sales staff has responsibilities for handling inquiries. That means different people are cross-trained to handle inquiries in order to ensure that someone is always available for incoming calls.

7. Ask:

Do you know how calls are handled in our organization? Who gets the first call? How does it get to the right person? Does it always? Who makes sure the call was handled correctly?

8. Explain backup team:

Ideally, the entire organization should be aware of the correct handling of inquiries, calls, and visits so that the visitor sees a coordinated front. One way to ensure this happens is to have a back up team on rotation.

The Back Up Team consists of three to five people who will be available on rotation to spend quality time with prospective residents and their family members by handling telephone or walk in inquiries, personal visits, and if needed, follow-up. Most importantly, they should be available for inquiries.

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[Show image of a backup team, ZERO page 19.]

Anyone can be part of the back up team as long as they are personable, can follow directions, interact well with residents, love their job, seek recognition, and love to contribute to the overall success of the community. In other words, they're team players.

[At this point in the training, you have to decide if your purpose is to gather likely candidates for the back up team, or move on, having made the point that a back up team will be formed.]

(Optional) Activity—Form a Back-Up Team

10 minutes



- 9. Purpose:** To identify a backup team to take calls and handle inquiries so that there is continuously someone responsible for making sure inquiry calls, walk-ins and personal visits are handled personally and professionally.

- **Part 1:** Invite participants to call out the names of individuals who fit the following description—they are personable and have the ability to follow directions. They interact well with residents, love their job, seek recognition and love to contribute to the overall success of the community.

[Emphasize that these people can be further incentivized, so that any added work is rewarded. Depending on the relationship of the people in the room, you may or may not want to discuss incentives.]

Write down the names on a flip chart.

- **Part 2: Put a blank time chart on PowerPoint.** Then ask participants to match the names they chose earlier for each time slot in each day of the week.

Where there are no people on the list for a particular time slot, ask the participants to think about people who work during that time slot and see if there is anyone who fits the desired qualifications. Participants can, of course, volunteer themselves.

The Inquiry System

3

Re-Inventing the Inquiry System

Purpose	The Inquiry System section is heavily focused on using Inquiry Connection Sheets to help salespeople find needs and close for an appointment.
Timing	1 hour 15 minutes.
Contents	<ul style="list-style-type: none"> • Typical Selling vs. Consultative Selling • The BILD Inquiry System Overview • Inquiry Step One—Engage • Inquiry Step Two—Identify Needs • Inquiry Step Three—Matching Needs <ul style="list-style-type: none"> ○ Activity—Needs and Match the Needs Role-Play • Inquiry Step Four—Close! <ul style="list-style-type: none"> ○ Activity—Measuring against a Baseline

Typical Selling vs. Consultative Selling

10 Minutes

1. Explain typical industry approach to inquiries:

As mentioned, inquiries in our industry are typically handed over the wall. But even when the right person gets the call, here's typically what happens:

- First of all, sales counselors typically ask just one or two questions to break the ice, build rapport or go straight to pre-qualification.
- Then, once the sales counselor has enough information to sell, they will begin to list their services, literally talking until they run out of breath.