

# Fair Sale

**Calls for increased disclosure and consumer education about aging in place have created some challenges for assisted living marketers selling their services**

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*By Angela Hickman Brady*

When it comes to full disclosure and consumer protection, it's critical all assisted living marketers go the extra mile to ensure customer care, and practice what they preach. How can assisted living providers meet the spirit of the Senate Special committee on Aging's concerns about these consumer issues while staying ahead of the competition in today's tightening market?

To shed some light on this issue, *Assisted Living Today* recently talked to four assisted living marketing professionals.

**Assisted living Today:** Assisted living operators have come under increased pressure from consumer advocates, the media, and government officials to more fully disclose fees, services, and limits on services (such as discharge criteria) to prospective customers during the marketing process. ALFA has developed tools to help providers in that regard. What practical challenges does the call for increased disclosure and consumer education pose for assisted living marketers? What are some ways to incorporate thorough consumer education and disclosure without overwhelming customers?

**Landis:** What are some ways to incorporate thorough consumer education and disclosure without overwhelming customers? Our sales trainers have a saying: "Don't spill all your candy in the lobby." And that holds true in this time of industry crisis, too. We have to have a packet of information that gives people full disclosure, industry information, and crisis data to go along with our beautiful lifestyle brochures.

We do not want to become like those awful drug commercials where the picture is pleasant, but the disclosure reading of the side effects makes you sick just listening. But along with being consistent and persistent, we can have support groups for adult children. We can have newcomers' groups to help with the transition. We can encourage respite care stays so the prospect actually "test drives" the community. We can talk about who we are and what we do and why it's important to the resident's well being.

Assisted living isn't just a numbers business, regardless of Wall Street's hopes. It's one on one. It's very personal and we have to find a way to deal with the adult child's guilt along with the full disclosure. And, we have to deliver what we say we deliver.

**Nowell:** The only practical limitation that exists as far as educating consumers is to ensure that it is done on a regular basis and that it is done correctly. We need to inspect what we expect. Almost every industry I can think of does some kind of mystery shopping to ensure that the standards that are in place are being observed.

Salespeople need to be trained as to why this process is so important and how to carry it out. My experience is that salespeople do not get enough training and are generally uncomfortable with not only the timing of when to bring up the sale, but also the proper language to use. I think salespeople generally struggle with the interview process. You need to discuss admission documents and disclosure information at the right time – usually after someone has bought into the community and concept emotionally and during the factual phase of the presentation.

The challenge is that some salespeople don't know the difference. They may talk about the price, size of apartment, and features of the community right off the bat and, in many cases, don't ever present the really important stuff. My fear is that these same salespeople, in an effort to comply, would also share the disclosure information at the wrong time and discourage the potential resident or family member from making a decision.

Another fear is that salespeople may feel that if they do bring up the disclosure information in the presentation and the competitors do not, they will have a disadvantage. Again, the disclosure information should not be brought up until it is appropriate – hopefully, after the salesperson has determined that the community can meet the needs of the resident and all the relevant issues have been brought to light.

One idea would be to incorporate a simple sign-off sheet that would be presented at closing to the family and or resident, which would ask whether the disclosure information was covered in the presentation.

**Wirthwein:** In a well-managed sales program, rapport-building is the first step, during which each party is free to probe the other in an attempt to gauge each other's credibility, means to deliver, and critical attitudes toward perhaps subtle, but important, values. This is the commencement of the more general process of qualifying one another.

I honestly see no issue of overwhelming customers. This would suppose that the marketing associate had lost the all important control of this balance, which can be essential in the initial phase. The practical challenges, regardless of what tools are available, are three essentials fundamental to any well-founded marketing program. Each involves a very natural balance of informational give and take.

First, a professional presentation offering an honest image of a commitment to service must be provided to establish value. This function includes not only the marketing staff, but all staff. Second, the qualifying process must provide the consumer with ample opportunity to obtain information, commensurate with their interest and qualifications to become a resident. Third, the marketing associate must follow through with all strategies in the marketing plan, including the offering and deliver of further information, again, appropriate to each prospective resident. This would also include the gathering of additional information.

The challenge here is keeping one's eye on the ball. If this were a tennis match, the marketing associates must always win their serve and play a fair game – the ultimate goal of which is to allow the resident to win the match.

**Wright:** The demand by consumers, industry critics, and regulators for more information really levels the playing field – and with it, poses great opportunity for the industry to define itself. Too often the marketing component has been placed outside the realm of day-to-day operations and procedures. It is time to look at strategies that take marketing on the high road, giving assisted living communities the edict that we must walk the talk.

The majority of assisted living providers can seize the opportunity of full disclosure as a great marketing strategy. Here are a few ways to do so:

- ◆ Begin the education process early on with consumers. Assume they know little about assisted living and how it can benefit them or a loved one. Let it be known that you will fully disclose all information that is important to making this decision.
- ◆ Provide objective checklists and information. Consumers want good information from neutral sources. Start with ALFA's Assisted Living Consumer Guide & Checklist. [ALFA also offers a Consumer Information Statement and Model Admission Agreement. Download at [www.alfa.org](http://www.alfa.org).] Use this opportunity to show that you meet and exceed all standards or expectations set by third-party groups or watchdogs.

**AL Today:** What advice and strategies do you have for marketing an assisted living residence in today's increasingly competitive market while meeting the needs of consumers for up-front, bottom-line information?

**Landis:** We still need to sell the lifestyle and the “what's in it for me” benefits, and we need to find a way to tell our success stories and have orientation sessions for caregivers before their parent or spouse becomes a permanent resident.

We need to choose residents that fit our profile of care, our niche in the marketplace. With staffing issues and regulators breathing down our necks, each community must know who they are, and who they serve best and why.

**Nowell:** I think there needs to be a shift from looking at the aging I place issue. The emphasis needs to be on safety, comfort, dignity, independence, and support – the issues assisted living customers are looking for. We need to educate consumers that it is not in the best interests of the resident to stretch the limitations of assisted living to the point where it compromises these principles. When we stretch past our ability to perform on our promises, we experience operational problems, higher employee burnout, low customer satisfaction, and lower profitability.

**Wirthwein:** Overall, responsiveness to the customers' overriding needs is primary. Residents want individualized, friendly but professional care delivered in a clean and safe residential setting. They want to receive services and a level of care that meets all their needs, without paying for services that do not. The strategy is pretty simple, especially if we remember this is a free-enterprise system, filled with an ever-rising number of competitors who we must assume will get this right: Give them what they want at a fair price.

Marketing such a product and actual product delivery are becoming more and more closely associated. For example, although product and marketing strategies differ from market to market as well as owner to owner, some fundamentals are constant, including outreach to influencers.

This contact element in the marketing plan may be extremely elusive, but it cannot be ignored. Each must clearly perceive the value and integrity of the provider not only by what the marketing associate says but by their own observations as well. In this process, there is simply no substitute for the real thing.

The real assisted living marketing success stories will be those well planned and implemented marketing programs that include the most comprehensive and candid exchange of information in both directions. The essential implication here is that the marketing director and associates utilize the most effective communications skills possible to maximize their return on investment of time and energy. The end result will also be a well-informed customer.

**Wright:** We are too often so anxious to tell someone all about us and how we are that we fail to develop a true relationship that creates trust, openness, and a mutually beneficial end result. No one can be all things to all people. Do more listening and less talking. Then, provide information on a timely basis.

In reality, how many people walk in the door and buy your services after the first visit? Probably, very few. Treat each contact in that context. Filter out the key information and discharge criteria as the relationship strengthens. Your customer will see you as a caring resource to help them with this process. And imagine how you will stand out from the competition.