



Twenty Ways Your Retirement Community Affects Marketing and Sales

By Jeff House

At least twenty aspects of retirement communities affect marketing and sales, assuming that the concept and operation of the community are fundamentally sound; an ill-conceived or poorly run community requires more than marketing intervention.

1. **Identity ways:** How does the community articulate and publicize its mission, vision and market position? Does the community “walk the talk” – does its performance keep its promises? Would the public, board, staff and management describe the community the same way?
2. **Product ways:** How does the community accomplish continuous improvement? Does the community maintain and upgrade its physical plant? Does the community improve the mix of services and programs to equal or surpass the competition? Does the community invest in innovation?
3. **Value ways:** How does the community balance its fees against the goods and services provided to residents compared to alternatives the prospective resident might consider? Is the community offering services or amenities that the market does not value or is it failing to offer any valued services? Is offering expensive amenities that are valued by only a few people raising the prices out of reach of many others?
4. **Lead generation ways:** How does the community attract the attention of potential residents? Do promotional materials represent the community accurately? Do community leaders and professionals refer their friends? Will affinity groups help spread the word? How many prospect leads come from paid sources like advertising versus from word of mouth, resident referrals, and earned reputation?
5. **Informing ways:** How does the community choose what information to disseminate to prospective residents? Who controls the message? What information is shared when? Can consumers easily get the information that is important to them?
6. **Lifestyle ways:** What is the personality of the community? Do residents want to be catered to or be self-sufficient? Does the “management know best,” or are “customers always right?” Are residents (and staff) elitist or egalitarian? Do people tend to gather in large groups, small groups, or keep to themselves?
7. **Diversity ways:** How does the community broaden or narrow its appeal to various groups of people? Is the community strongly associated with any particular group, e.g., a religious denomination, profession, or university? Does the community reach out to attract and welcome all qualified prospects regardless of race, creed, ethnicity, sexual preference, etc?
8. **Probing ways:** How and when does staff gather and use information about the demands, preferences, needs and concerns of prospective residents? Does the community learn from the probing how to promote continuous quality improvement? Probing is different than qualifying.



9. **Process ways:** Does the process put the community and prospects in respectful relationship to each other? What actions must each party take between the first expression of interest and moving in? What forms must be completed? What deposits are required when? What is the withdrawal process? Does the process make it easier to say “Yes”? Does the process assure that prospective residents are informed consumers?
10. **Qualifying ways:** How does the community determine whether a prospective resident qualifies for residency? Are criteria objective and openly stated? Are qualifying criteria more or less stringent than necessary? Are the qualifying criteria empirically tied to successful residency?
11. **Cultivating ways:** How does the community maintain and strengthen the interest of prospective residents? Once a prospective resident expresses interest, how does the community go about strengthening that interest? How is a prospective resident made to feel like a member of the community?
12. **Persuading ways:** How does staff overcome a prospect’s objections or misgivings? Does staff try to convince with factual information about features or to persuade by showing how the prospect would benefit from residency? How much of the persuasion is verbal and how much is through interaction with current residents or trial visits? How often does the community have to offer incentives to persuade prospects?
13. **Independence ways:** To what extent do residents have the ability to customize their residences and/or to choose among contract alternatives? Does the community minimize constraints that might deter a prospect? What is the role of residents in the governance of the community?
14. **Business ways:** What are the practices of the community as they relate to financial and/or contractual interactions with the prospective resident? Are all documents in plain English? Does the community have a history of honoring or exceeding its contractual commitments to residents? Have fee increases been in line with resident expectations?
15. **Inclusion ways:** How does the community welcome newcomers and incorporate them into community life? Do new residents and staff have to earn their way into the community **or** does the community reach out to include them?
16. **Learning ways:** How does the community collect and use relevant information to find ways of improvement? Does the community make use of statistics, competitor research, focus groups, resident satisfaction surveys, or wait list satisfaction surveys to improve performance? Does the community provide for continuing professional education for the marketing staff?
17. **Motivation ways:** How does the community motivate the marketing staff to achieve the goals of the community? Is performance rewarded in ways that matter to the marketing staff and which are contingent upon the staff achieving meaningful community goals? Do sales incentives advance the goals of the community?
18. **Management ways:** To what extent does management understand and support the marketing and sales functions? What is the relative organizational status of the marketing director? Does management take recommendations from the marketing staff seriously? Does marketing get good operational support? Who sets the marketing budget?



19. **Resource ways:** How and how well does the community provide the resources necessary for the sales and marketing staff to meet the goals of the community? Is the budget sufficient? Are marketing offices appropriate to someone expected to be a professional advisor? Does the budget provide for effective displays, access to consultants, etc.?

20. **Sales ways:** How does the marketing staff relate to prospective residents? Is staff perceived as a trusted advisor or a commissioned sales person? Are all representations factually accurate?

Perhaps a community could conduct its own internal audit. Examine these twenty areas to determine how your community might complement sales and marketing, thus increasing revenues.