

Michael Marlow

**North Dakota Long Term Care
Association**

***Selling the Senior Living
Experience***

September 24, 2025

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Happy National Women's Health and Fitness Day



4

Michael Marlow

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Senior Living!

5

Michael Marlow

I



North Dakota!



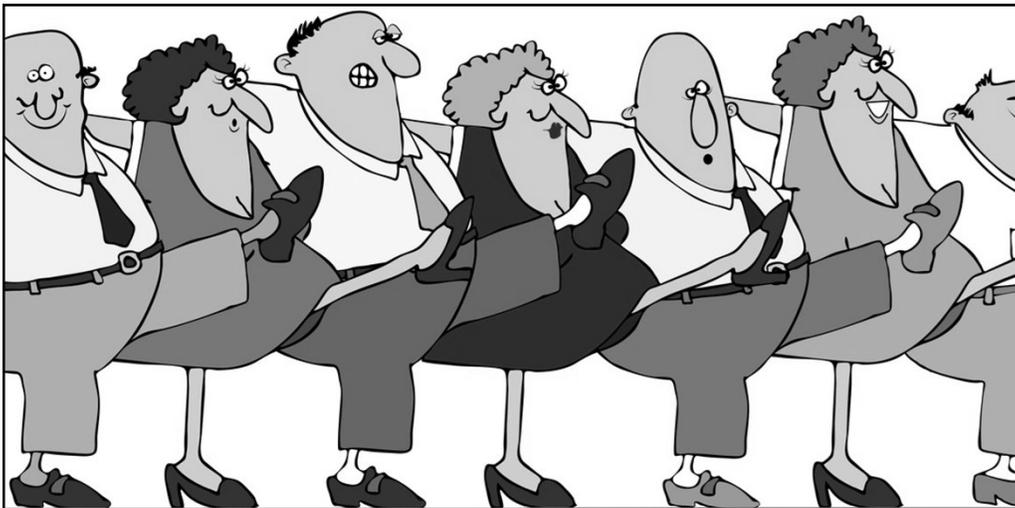
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Our deepest fear is not that we are inadequate. Our deepest fear is that we are powerful beyond measure. It is our light, not our darkness that most frightens us. We ask ourselves, who am I to be brilliant, gorgeous, talented, fabulous? Actually, who are you not to be? You are a child of God! You playing small does not serve the world.

Marianne Williamson, *A Return to Love*

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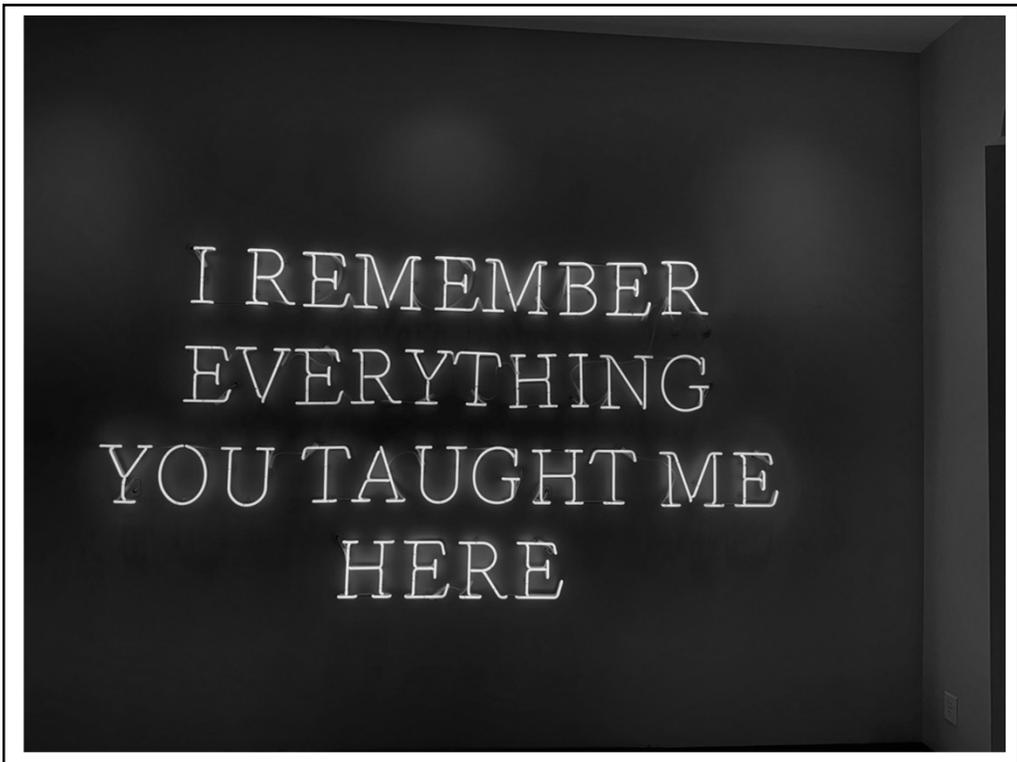
Comfort, connections and fun – helping seniors live their best lives.

Find your joy here

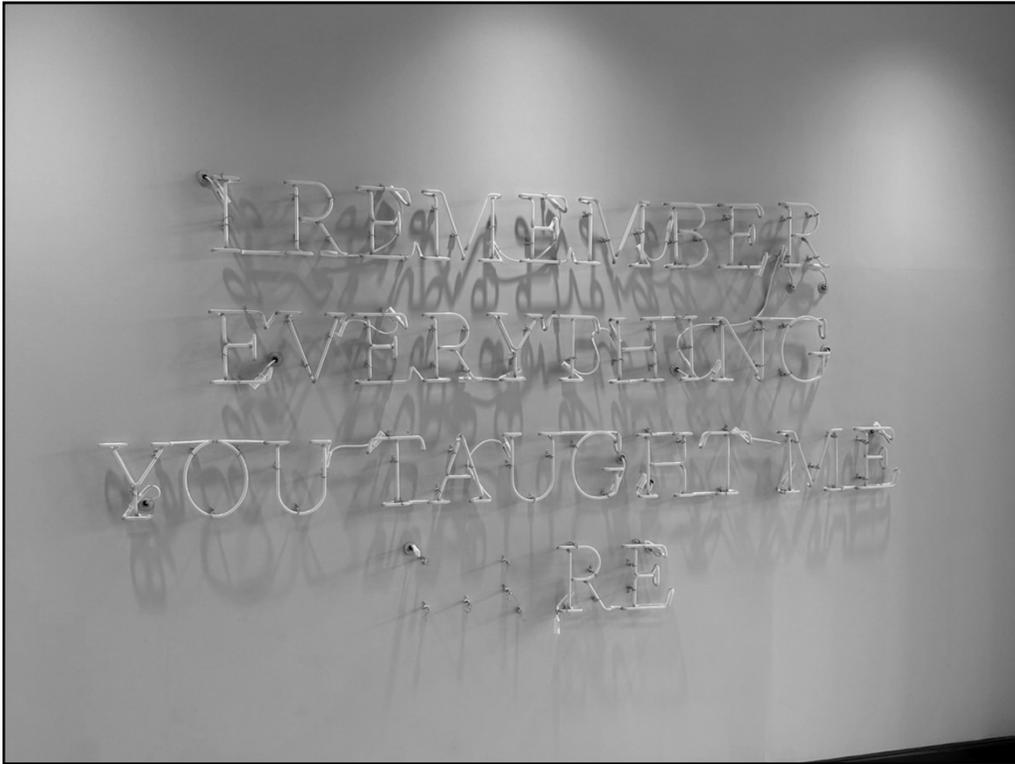
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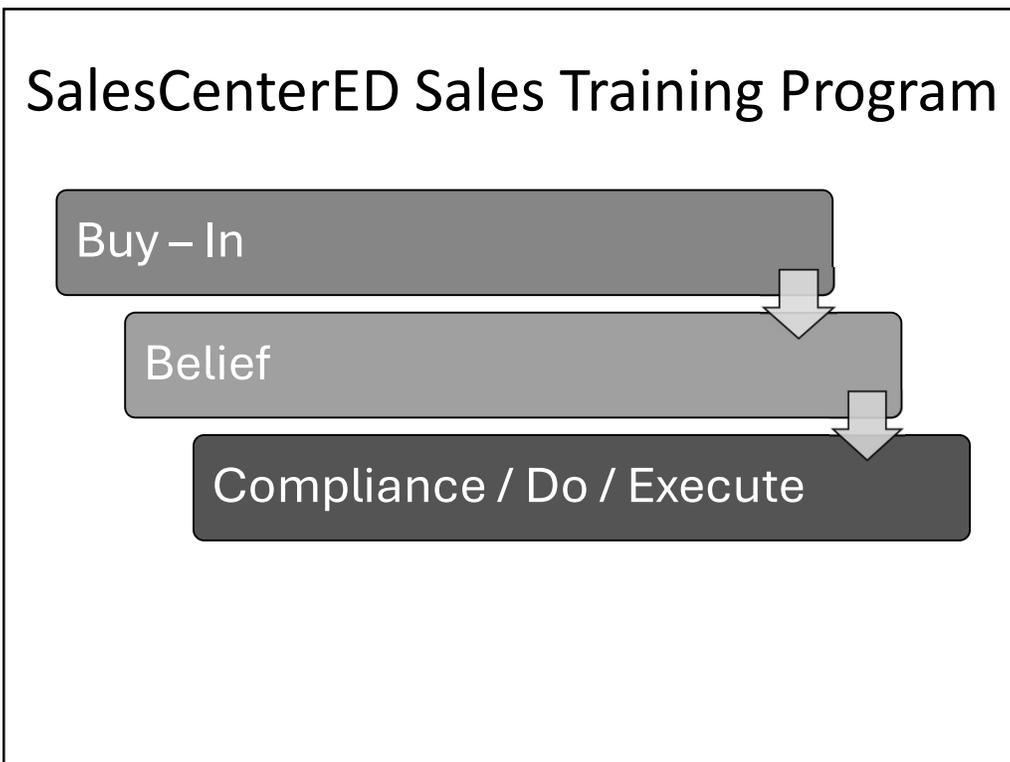
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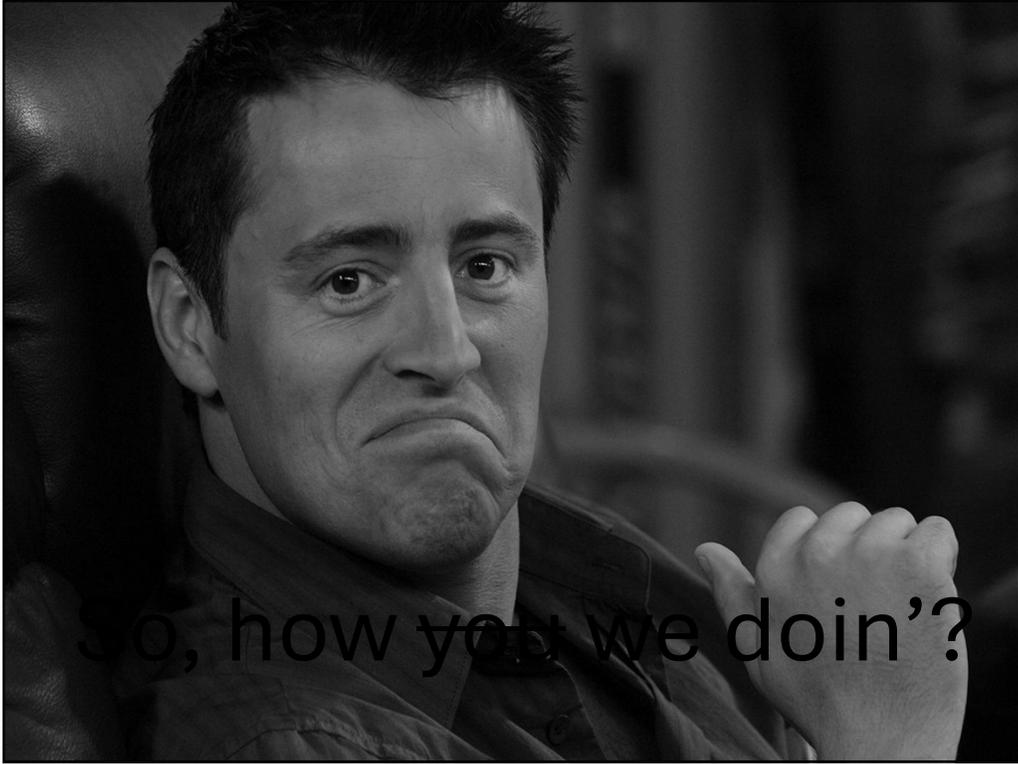
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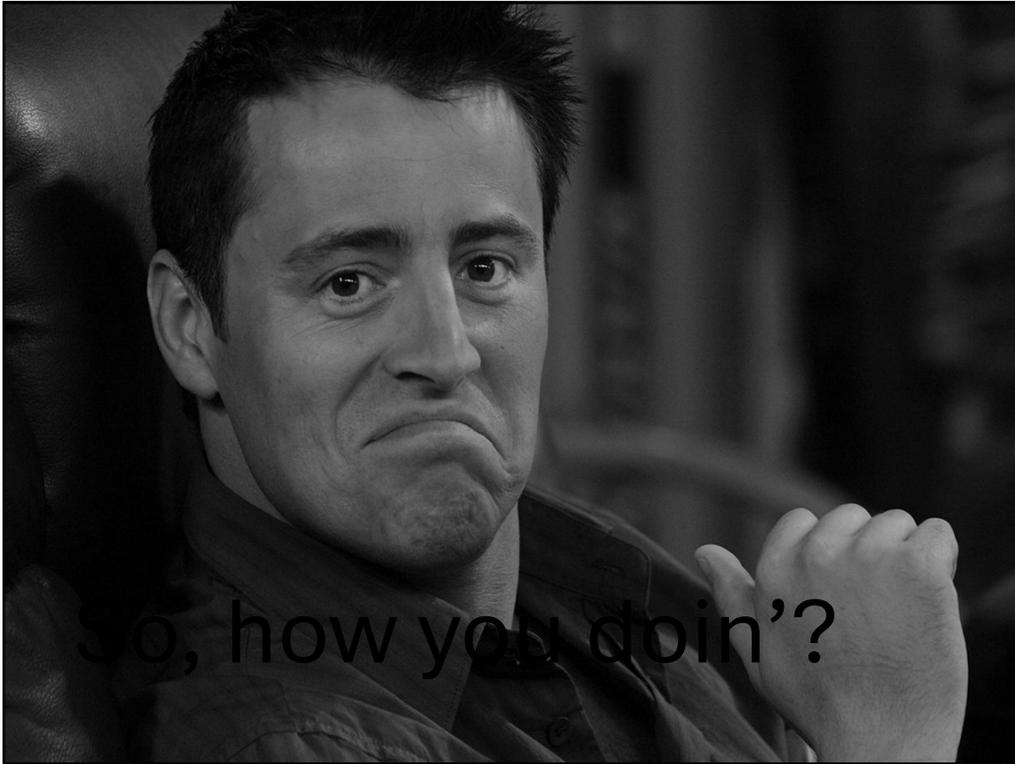
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5ish Questions

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1. What is our overall national senior living occupancy?

17

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2. What is the total overall valuation of our industry?

18

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3. What is the estimated total overall valuation of our industry in 2030?

19

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4. What is the total amount of unpaid caregiving provided in the US in 2024?

20

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5. What percentage of seniors 65+ will ever live in a senior living community?

21

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6. What do these numbers represent?

1:1

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7. What are the top 5ish currently most streamed shows on Netflix?

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Senior Living, Inc.



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Total Valuation
\$923 Billion

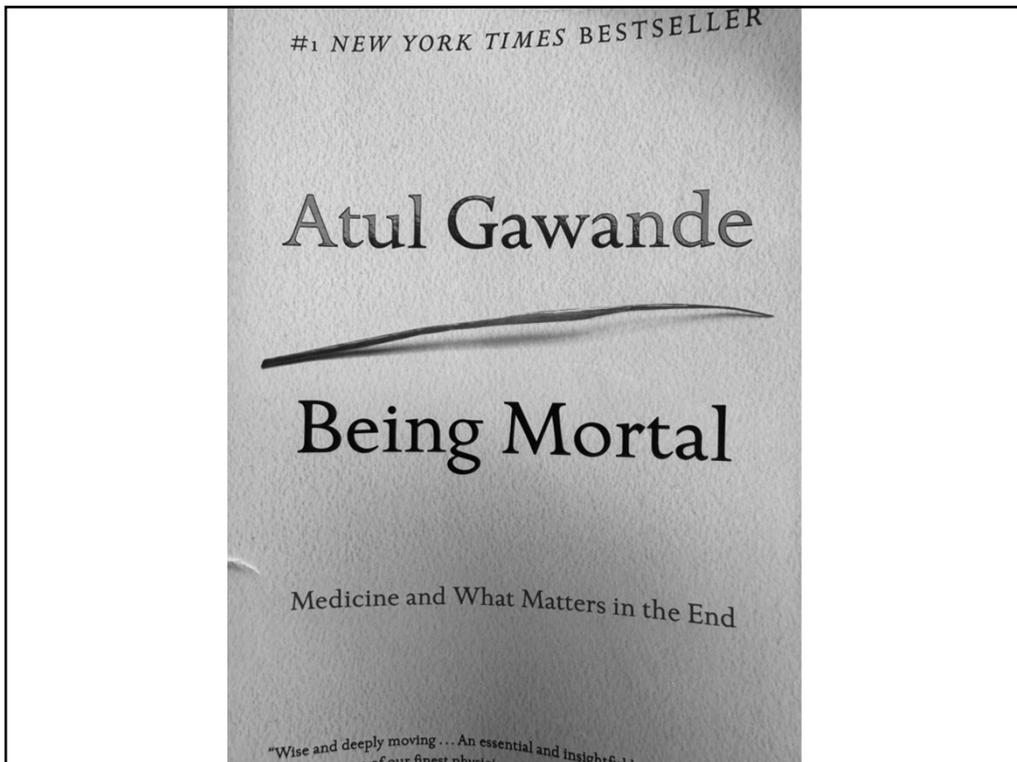
Total Valuation - 2030
\$1.3 Trillion

Total Unpaid Caregiving
\$1.1 Trillion

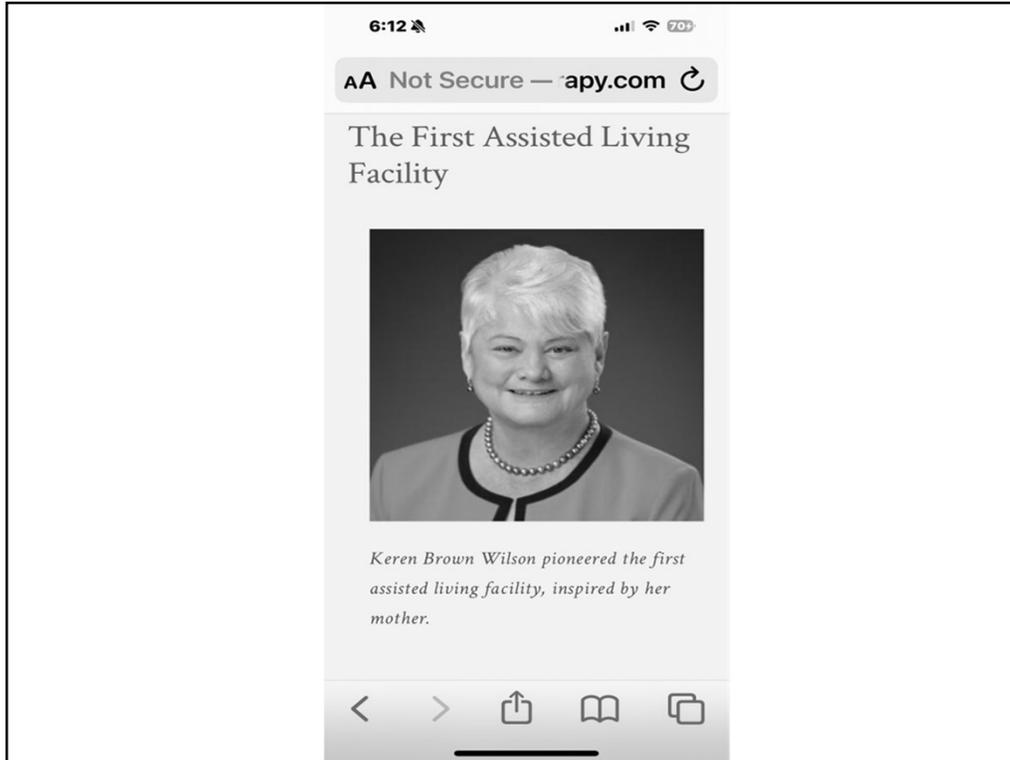
Our Opportunity!
1:1

2 3 4 7 8 9

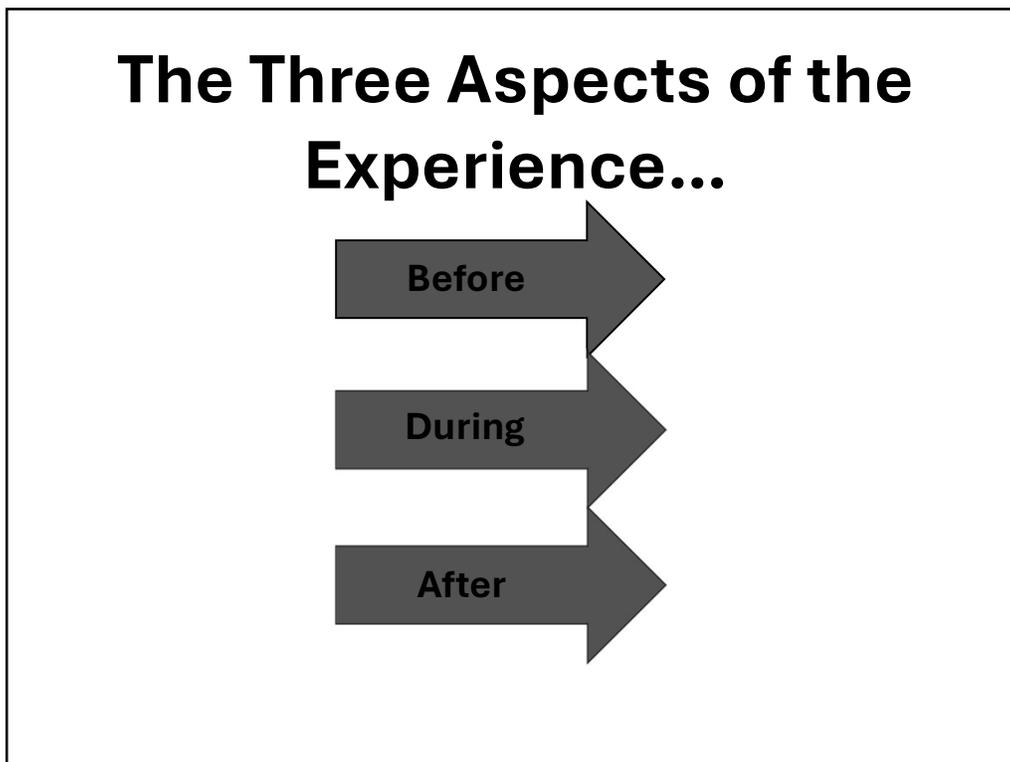
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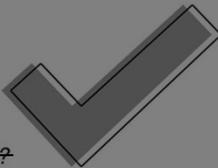
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MOVE-IN CHECKLIST

*Wondering what you **really** need for ~~Mashburn Hall?~~ **Watercrest Senior Living?***

<p>BEDDING</p> <ul style="list-style-type: none"> <input type="checkbox"/> Bed Pillows <input type="checkbox"/> Mattress Pad <input type="checkbox"/> Sheets (Twin XL) <input type="checkbox"/> Comforter <input type="checkbox"/> Blanket/Throw <p>BATH</p> <ul style="list-style-type: none"> <input type="checkbox"/> Towels <input type="checkbox"/> Washcloths <input type="checkbox"/> Shower Curtain <input type="checkbox"/> Toiletries <input type="checkbox"/> Shower Caddy <p>EATING</p> <ul style="list-style-type: none"> <input type="checkbox"/> Microwave (Under 1,100 watts) <input type="checkbox"/> Microfridge (Under 3.5 cu ft) <input type="checkbox"/> Plates and Bowls <input type="checkbox"/> Cups and Mugs <input type="checkbox"/> Eating Utensils 	<p>LAUNDRY</p> <ul style="list-style-type: none"> <input type="checkbox"/> Laundry Basket <input type="checkbox"/> Detergent (Liquid Only) <input type="checkbox"/> Stain Remover <input type="checkbox"/> Iron (Automatic Shut Off) <input type="checkbox"/> Ironing Board <p>ROOM DECOR</p> <ul style="list-style-type: none"> <input type="checkbox"/> Area Rug/Throw Rug <input type="checkbox"/> Decorative Pillows <input type="checkbox"/> Lamp <input type="checkbox"/> Floor Lamp and Light Bulbs <input type="checkbox"/> Picture Frames <input type="checkbox"/> Wall Art <input type="checkbox"/> Wall Safe Adhesive (3M) <p>ELECTRONICS</p> <ul style="list-style-type: none"> <input type="checkbox"/> Computer <input type="checkbox"/> Surge Protector <input type="checkbox"/> Alarm Clock 	<p>PROHIBITED ITEMS</p> <ul style="list-style-type: none"> <input type="checkbox"/> Pets (See Living Guide) <input type="checkbox"/> Halogen Lamps <input type="checkbox"/> Candles <input type="checkbox"/> Space Heaters <input type="checkbox"/> Waterbeds <input type="checkbox"/> Electric Blankets <input type="checkbox"/> Hot Tubs, De Lofts or Cinder Blocks <input type="checkbox"/> Incense <input type="checkbox"/> Alcohol (Including Paraphernalia) <input type="checkbox"/> Drugs (Including Paraphernalia) <input type="checkbox"/> Electric Potpourri Burners <input type="checkbox"/> Toaster Ovens <input type="checkbox"/> Toasters <input type="checkbox"/> Broilers <input type="checkbox"/> Skillets <input type="checkbox"/> Hot Plates
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The Fourth Aspect of the Experience!

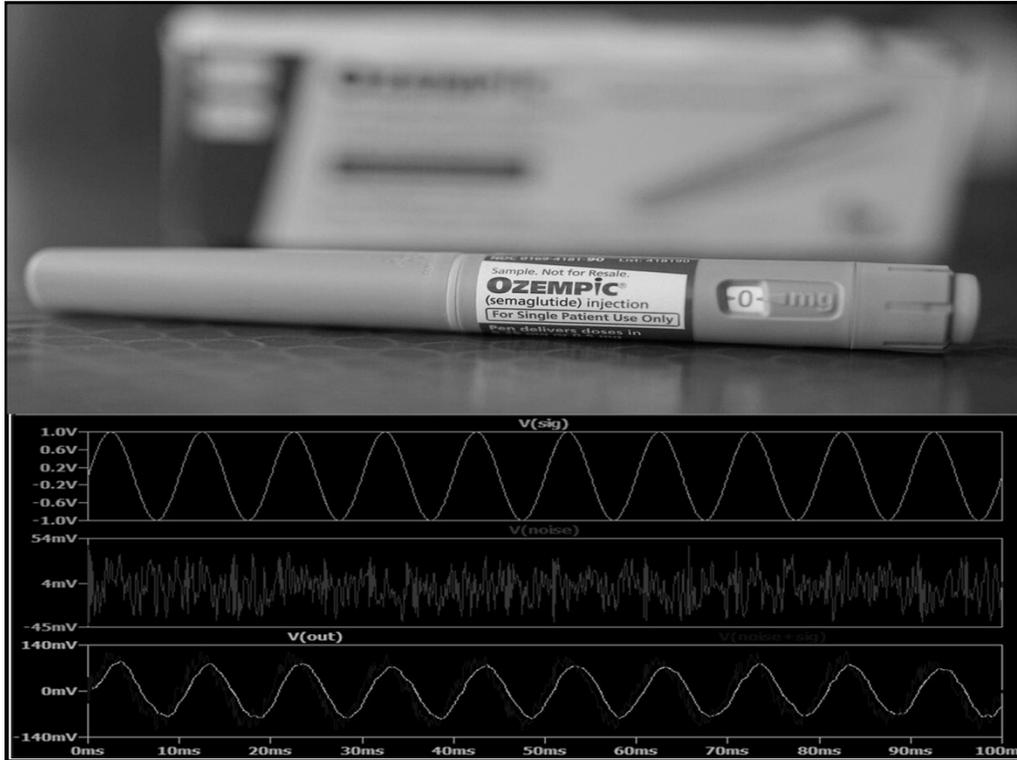
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The rate at which an organization learns may become the only sustainable source of competitive advantage.

Abebe Kebie Hunegnawu

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The Lone Nut and the First Follower = A Movement!

<https://youtu.be/256eKjULdgQ>



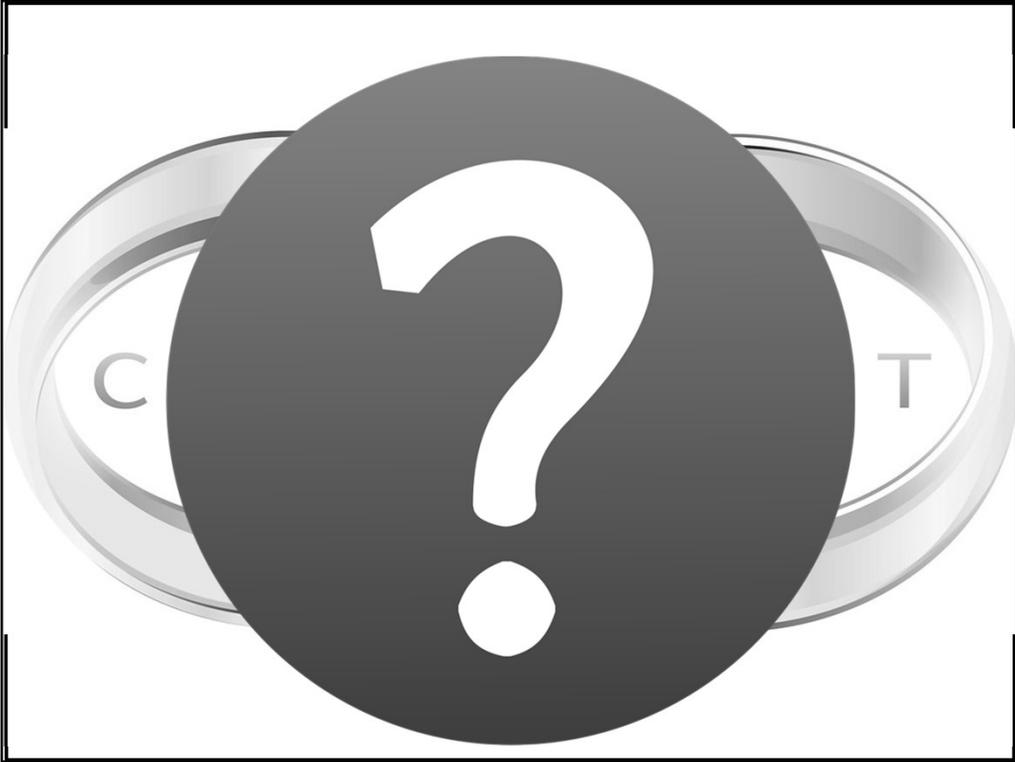
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Imagine yourself as an adult child, considering a senior living community for your parents.
What would make your Experience *Meaningful*, *Memorable* and *Unique*? What would you expect from a community in one word?

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Are you willing to do what most people won't?

34



35



36

THE WHY!

87.2%
78.7%
O

88.1%
81.8%
IL

85.4%
75.4%
AL

80.2%
74.1%
SNF

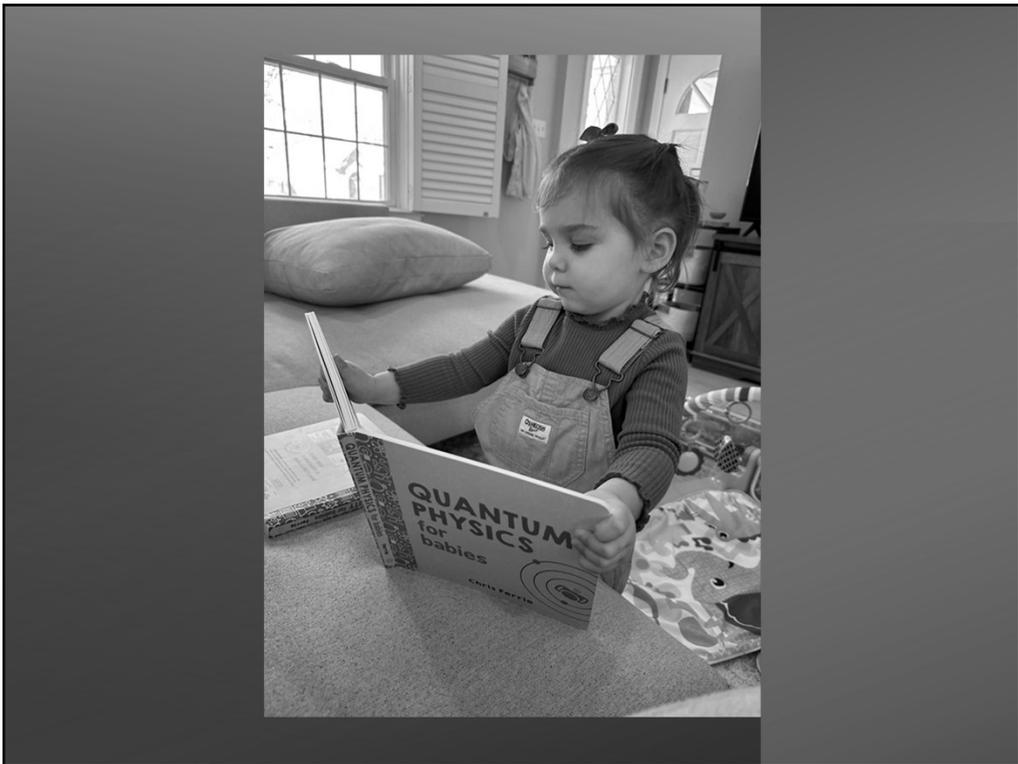
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My Communities Report Card

Inquiry to Experience (30%) 53% / 56% / 57%
Experience to Move In (26%) 34% / 45% / 46%
Inquiry to Move In (6% - 10%) 18% / 25% / 26%

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THE CENTRAL MESSAGE FOR TODAY...

We must give our customers a glimpse into what their life could be like in your community by creating a meaningful, memorable and unique Experience for our residents and their family members and that must start while they are still considering your community.

THE CENTRAL QUESTION FOR TODAY...

Upon what is that glimpse of the meaningful, memorable and unique Experience based?

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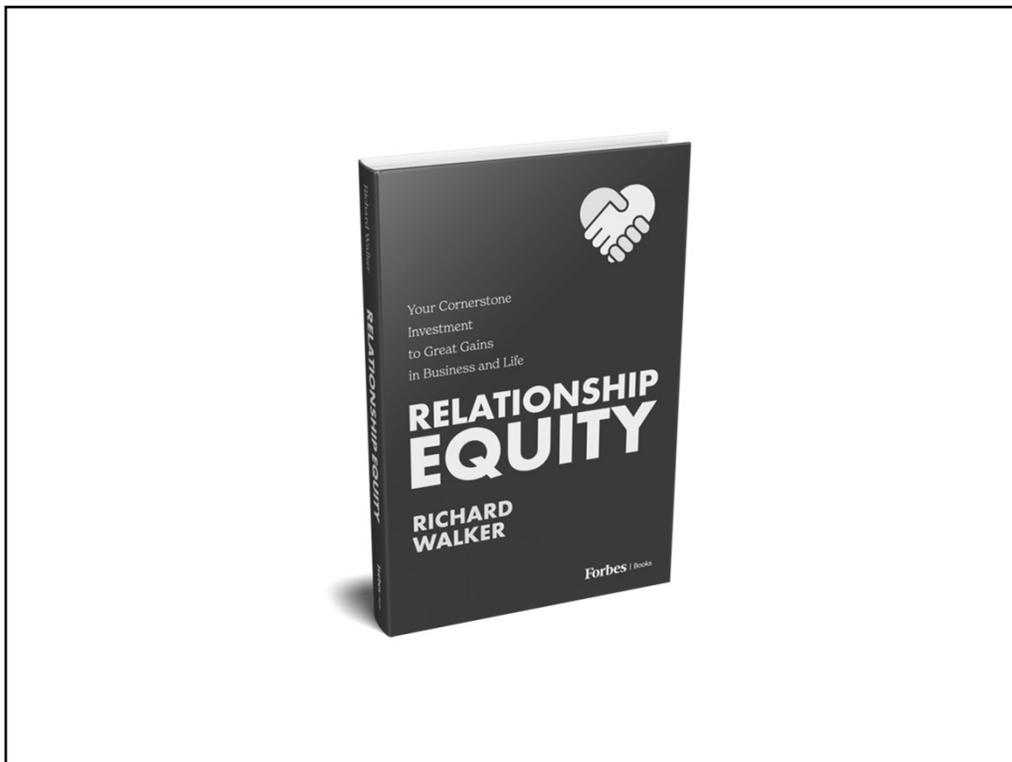
Seek first to understand, then to be understood

Stephen Covey

The greatest hunger of the human soul is to be understood

St Francis of Assisi (and Greg)

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Seek first to understand, then to be understood

Stephen Covey

The greatest hunger of the human soul is to be understood

St Francis of Assisi (and Greg)

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**THINK
DIFFERENT**

- Steve Jobs

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Isn't it nice when the
right thing to do is
also good for your
business?



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<p>Marketing</p>	<p>SELLING</p>
<p>The total of activities involved in the transfer of goods from the producer/seller to the consumer/buyer, including advertising, shipping, storing, and selling.</p>	<p>To persuade or induce someone to buy something.</p>
<p>INQUIRY</p>	<p>MOVE IN</p>

48



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CUSTOMERS

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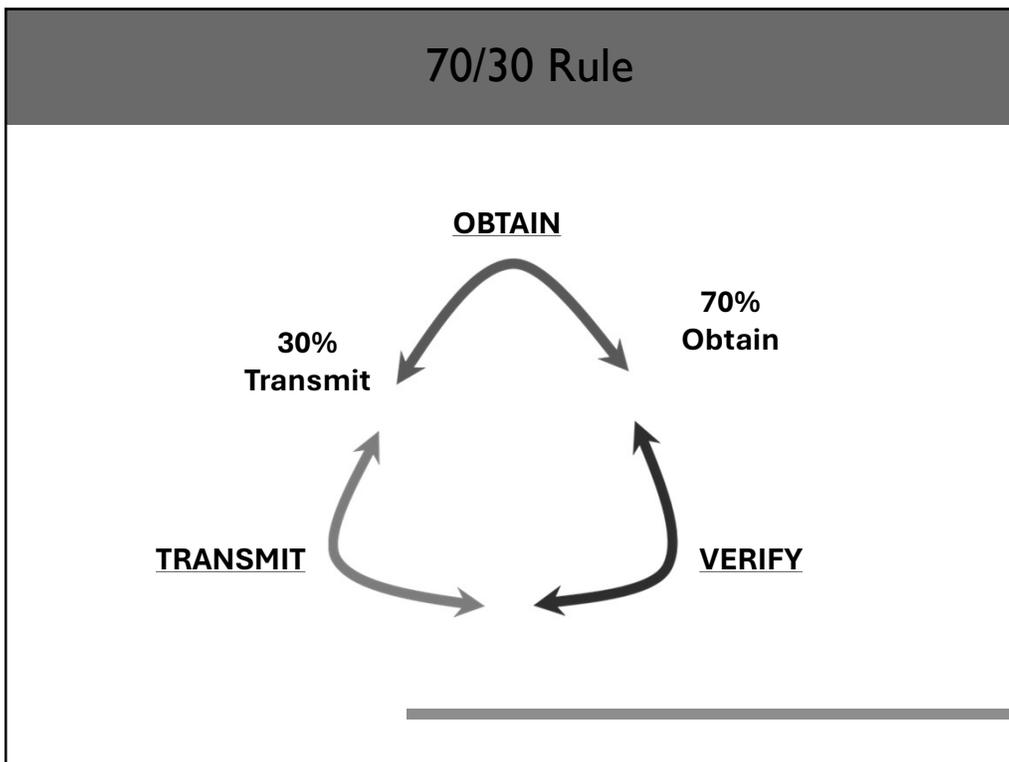
SALESCENTERED SALES STANDARDS

Deep Discovery	We are intensely interested in our prospects, their family members, and our referral partners. Utilizing the funneling process, we uncover the wants, needs and the emotional core of each customer's senior living buying experience.
Personal Connections	We handwrite thank you notes after every in person or telephonic interaction. We complete a Personal Connection and agreed upon follow-up in the form of an email, phone call, text or home visit within 48 hours.
Team Sell	We team sell daily and are responsible for growing and fostering a fun, SalesCenterED culture at our community. We engage our department heads, front line staff and our residents and their family members in the sales and follow up processes. We involve the entire community team in selling!
Daily Strategy Meetings	With our executive director and department heads, we lead daily, strategic, stand up, 10:51 / Hot Board meetings. We hold one another accountable for completing agreed upon follow up actions, i.e. Next Steps.
Fast Follow Up	We respond to ALL inquiries and referrals as quickly as possible or within 30 minutes of receipt. We also train our Inquiry Response Team to do the same. Acting urgently creates urgency for our customers.
Persistent/Creative Follow Up	We call, email, text or visit new inquiries or referrals five times in the first three days of receipt. We continue to follow up at a thoughtful, and agreed upon, scheduled cadence thereafter to advance the sale. Our follow up provides our customers with a glimpse into the importance of follow up in our community.
Advise	We advance sales by setting next steps during every interaction with a prospect or referral source. Those agreed upon next steps are completed urgently.
Track	We utilize our CRM every day and enter accurate, timely and detailed information to track our progress with each prospect or referral source. ALL contacts with ALL customers, including Discovery-based notes, are entered daily.

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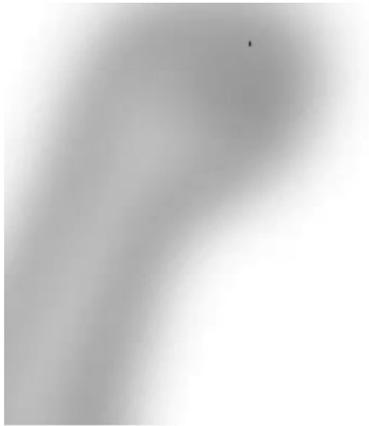


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Follow-Up Questions

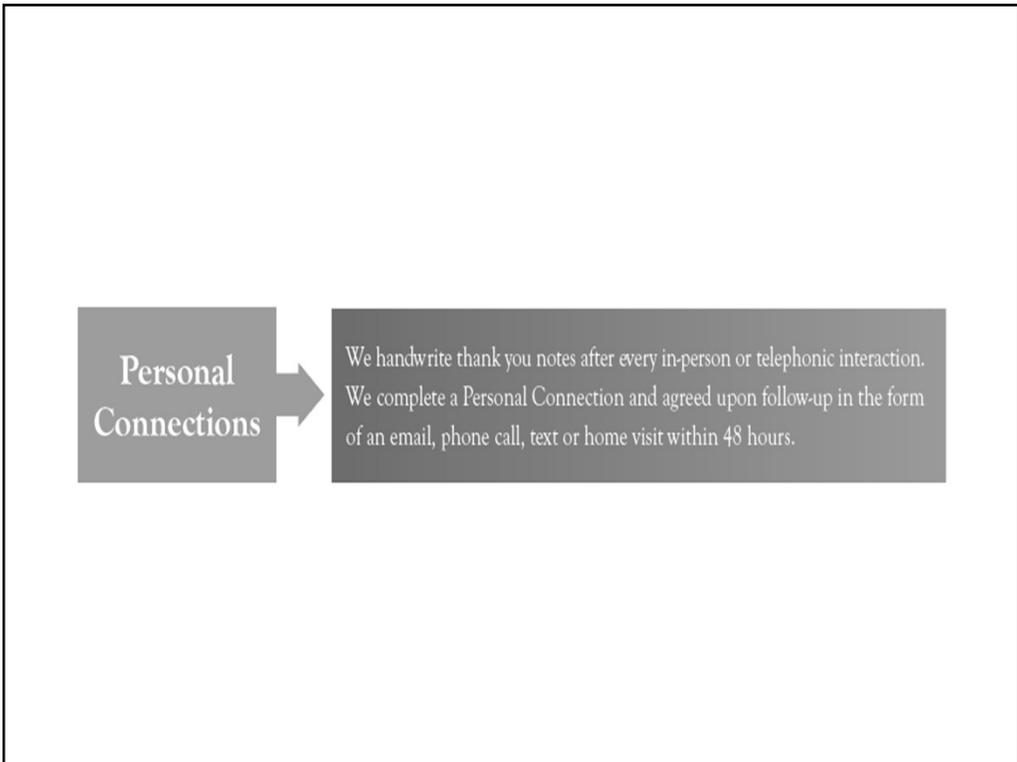
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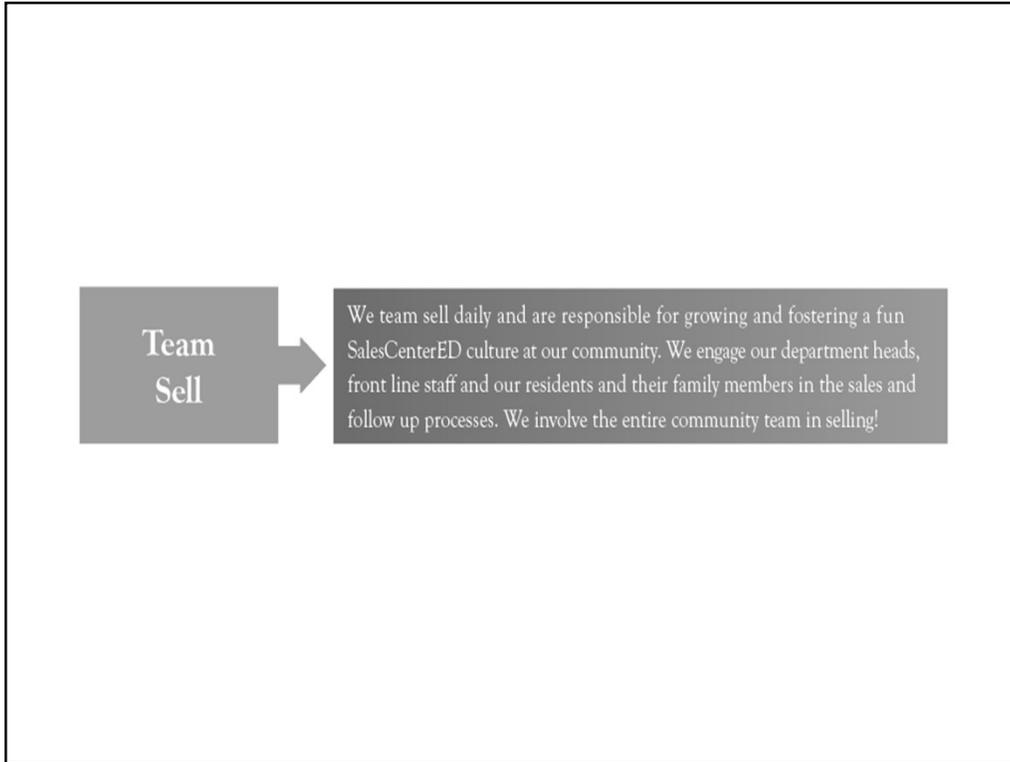
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https://www.linkedin.com/posts/reed-davis-15388956_how-did-a-2-hotdog-change-the-course-of-activity-7027369155322400768-fvXG?utm_source=share&utm_medium=member_ios

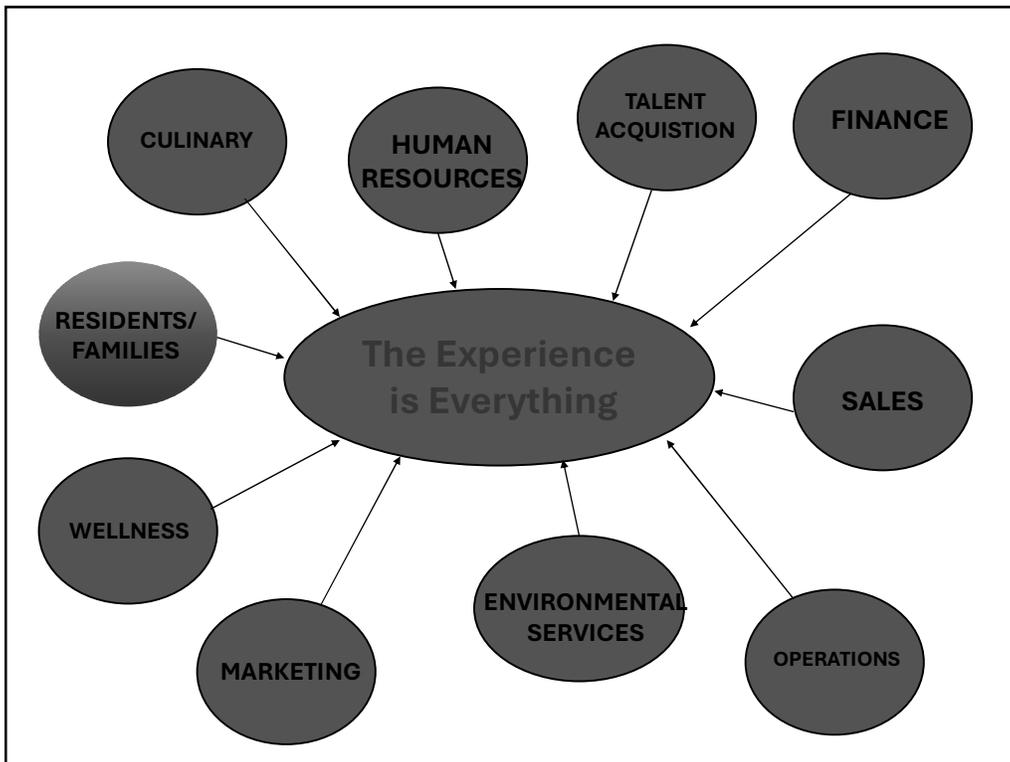
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<https://youtu.be/fUjpO7DnzBg>

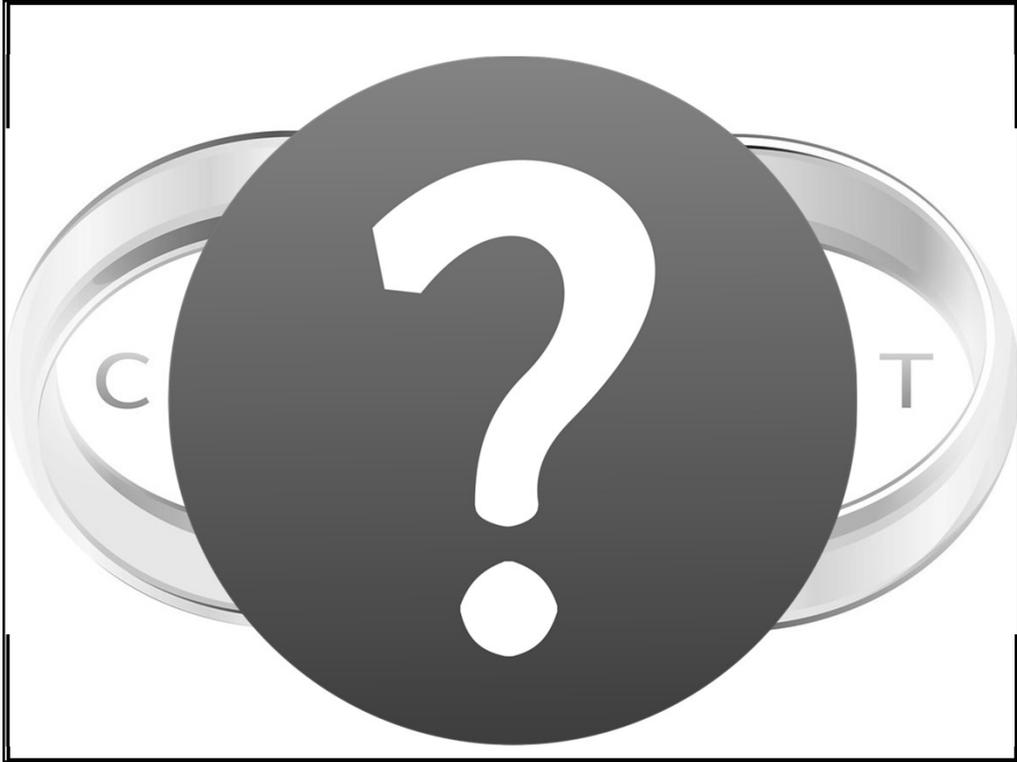
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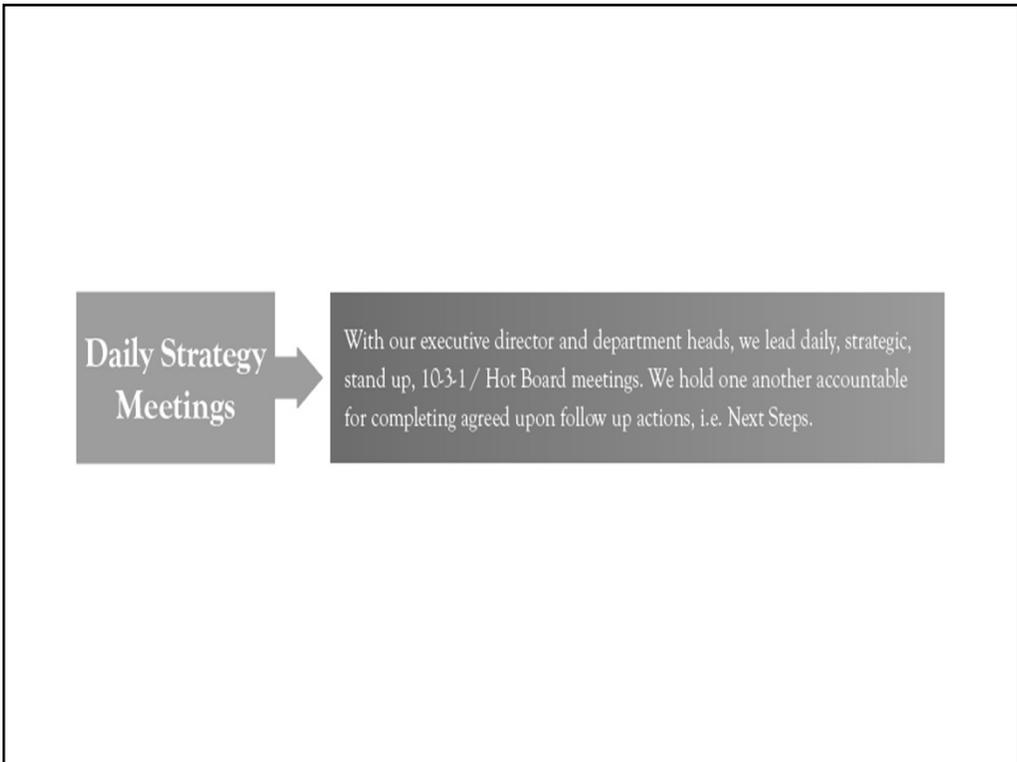
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Velocity / Volume vs. Time / Skills

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10 - Name/Influencer	3 - Top 3 Needs	1 - Personal Connection(s)	Next Steps
Richard and Millie Reese – KDMs! Steve Reese – son Michael Reese – son	- Time back in Richard's day - caring for Millie - Spacious apartment - Multiple dining options - Sons want background checks on employees – Steve is in the S/L biz	- Richard LOVES bourbon, Woodford Reserve specifically - Millie loves UK basketball - Michael was a baseball player at UK	8/8 – Don – Face Time "with Richard only" - medical capabilities for Millie 8/8 - Jamie – phone today and PC thank you card to Reeses 8/8 – Brenda – introduce Richard to the Smiths (UK grads) – Face Time? Intro sons to Mr. Jones' daughter (St. Lukes church) – Face time? 8/8 – Team – "I Promise" notes with Woodford "waiting for him" (Amy)
Ray Hill Nick James, ARNP	- Meals prepared - People! – socialization – widowed in 2019 - Nick referred Ray - wants health updates monthly – great referral opportunity?	- In construction his whole life - Loves playing church music - Sitting on his patio - Loves hot dogs and chili	8/8 – Ed to meet with Ray at home. Outdoor chair with his name on it – model apt for 8/12 experience? 8/8 – Amy – record/send (One Day) Mrs. Smith playing piano – "Looking for accompaniment?" Amazing Grace? 8/8 – Don to call Nick discuss communication preferences/additional Discovery 8/11 – Kris – sign for Ray's experience 8/12 – add PC items to sign
Henry Wasneski Susan Swann – daughter Dr. Suzanne Shemwell – daughter/KDM?	- Cancer survivor/health minded - Shower and med assistance - Independence and "male connections" - Suzanne – chiropractor - very interested in our medical capabilities	- Aviation Engineer with The Boeing Company for 35 years - WWII Vet; Navy Aviation Pilot - Earned a Navy Cross - Knows Bert Hemmingway	8/8 – Ann - Ask Mr. Hemmingway to email / offer Face Time visit ASAP 8/8 – Team - Fed Ex "I Promise" notes to Henry. Regular mail note from 3 male Ambassadors to Henry – Q&A offer – get WWII stamps from Post Office (Timothy) 8/9 – Jamie MIGHT know Dr. Shemwell's med partner – report back. Offer Don call?
Ethel James – KDMI Michael – Only son but lives in Italy	- Housekeeping, dining, and yard work - Recently lost driver's license (Macular Degeneration) – transportation - Wants apartment near lobby - Michael – "uninvolved" but okay to contact	- Ethel - knits / quilts / volunteers to make items for the local hospital - eyesight is becoming issue - Certified hospital chaplain - Widowed – interested in male companionship - Michael – "sorta government job"	8/9 – Amy - One Day video "Tightly Knit" club to Ethel - send ASAP 8/9 – Ed to make home drop – offer Ambassadors club offer to Face Time 8/9 – Brenda to contact Michael – Discovery focus AND ask Dr. Hollon about his chaplaincy hospital – connect via phone? 8/9 – Don - will Dr. Williams call her re: eye exam visits?
Walt & Sharon Ansell Timothy Ansell – son/POA/KDMI Kris Marshall – daughter/KI?	- Sharon - ambulation issues / ongoing weight gain - Walt and Sharon need help down sizing - Timothy – lawyer - Kris – works at PETA – KI – shows horses	- Snowbirds in Sarasota - Walt drives/loves a 1992 Lincoln Continental - Walt loves to dance and wheel Sharon around the dance floor as she sits on her walker - Timothy – has requested RA	8/9 – Ed – hand deliver RA to Timothy tomorrow 8/9 – Timothy and Kris – Face Time experience with Ansell's – meet team? 8/9 – Don to call Timothy today – introduce Dr. Mills, Med Dir 8/9 – Jamie – Sarasota weather report app to Ansell's
Don – Director of Nursing / Ed – Executive Director / Jamie – Sales and Marketing Director / Brenda – Sales Counselor / Amy - Life Enrichment Director Ann - Director of Culinary Services / Timothy and Kris – Concierges			

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The Most Common “Opportunities” when using the 10-3-1/ Hot Board

1. Lack of involvement from department heads
2. Lack of creativity
3. Inconsistency in meeting dates/times
4. Not sharing the “Why?” with your team
5. Weariness

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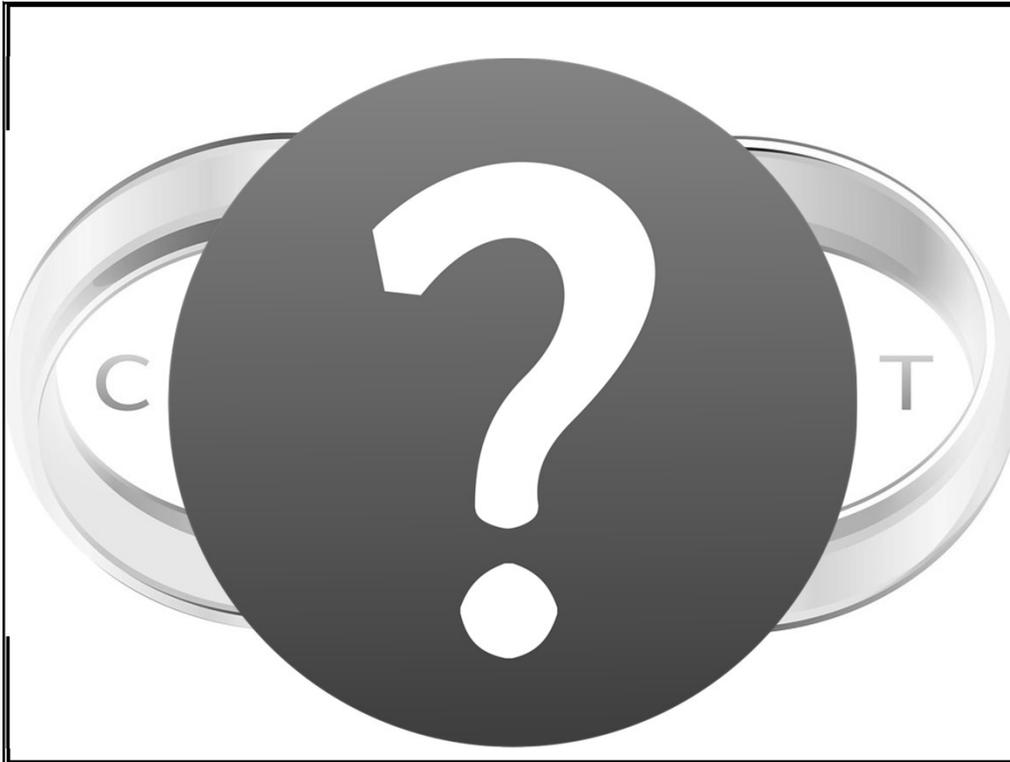
The Blueberry Pie Story



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What aspects of the
Blueberry Pie
Experience is your
community incapable
of executing?

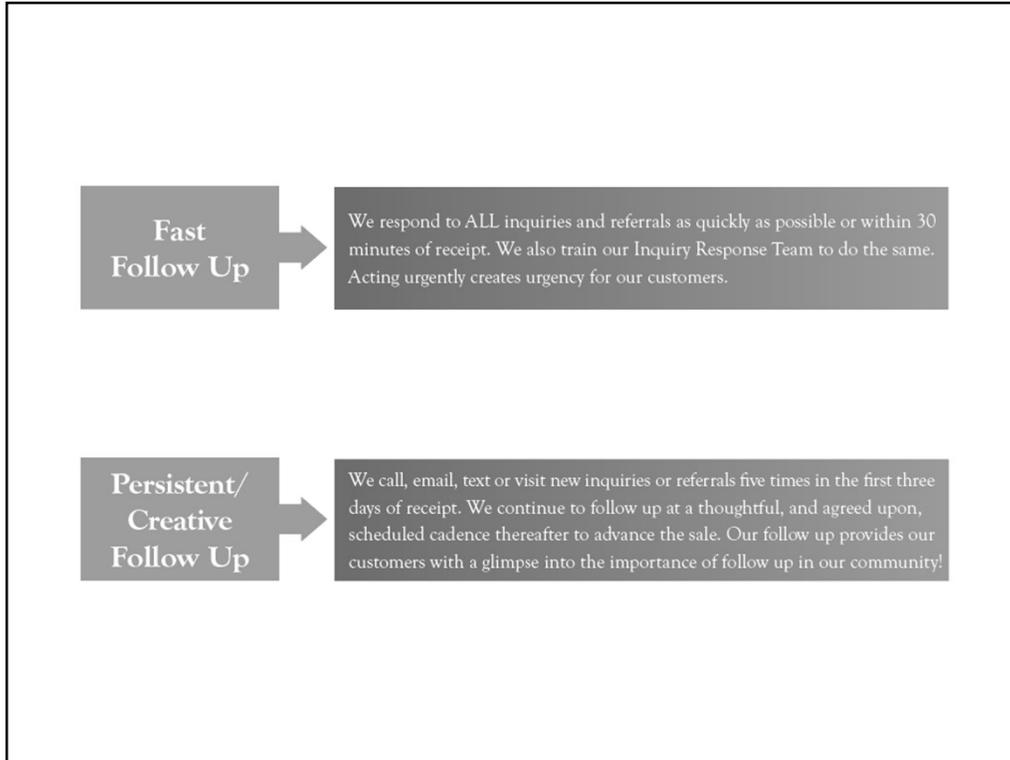
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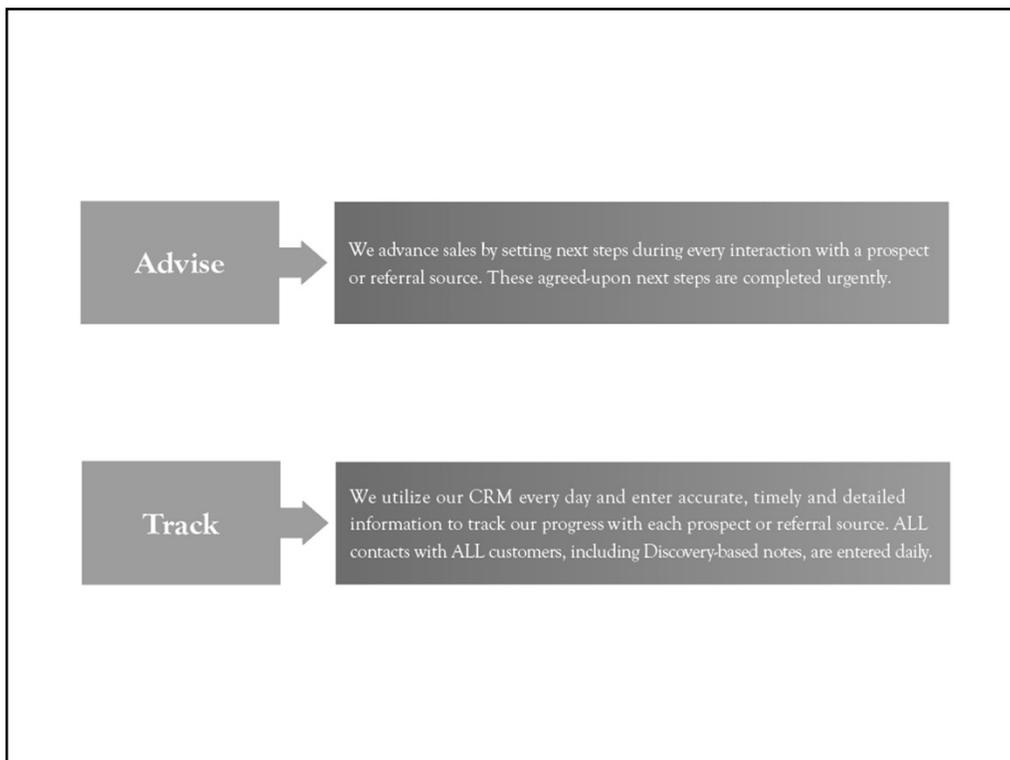
71

Isn't it nice when the right thing
to do is also **good for business?**

72



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Case Study – Dixie Sopes

- Dixie Sopes – potential resident / mother
- Susan Kendall – daughter
- Mathew Sopes – son
- Lynette Cassidy – pharmacist / referral source

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<p>Dixie Sopes</p> <p>83 years old</p> <p>Financially qualified / owns home with no mortgage</p> <p>Never worked outside of home</p> <p>Loves to bake</p> <p>Widowed 2 years from Anthony after 61 years of marriage</p> <p>Dog “Tootsie” and cat “Patches”</p> <p>Has visited community</p>	<p>Mathew Sopes</p> <p>Lives in Arizona</p> <p>High school athletic director</p> <p>Divorced / no children</p> <p>Remotely involved with Dixie</p> <p>Has not visited community</p>
<p>Susan Kendall</p> <p>Mother of 3 (11, 13 and 17)</p> <p>store</p> <p>Husband Jack travels weekly</p> <p>Catering manager at Landry’s restaurant</p> <p>Coordinating “Project Graduations” for oldest son Madison</p> <p>Overwhelmed and very busy</p> <p>Has visited community</p>	<p>Lynette Cassidy</p> <p>6 years as a pharmacist at local chain store</p> <p>Born and raised in Houston</p> <p>Referred Susan to Tanglewood</p> <p>Back to work for 2 weeks after birth of</p> <p>Has not visited community but knows “someone who works there”</p>

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Are you willing to do
what most people
won't?

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The Experience Continues...

WOW Moments



Legendary
VS
Essential

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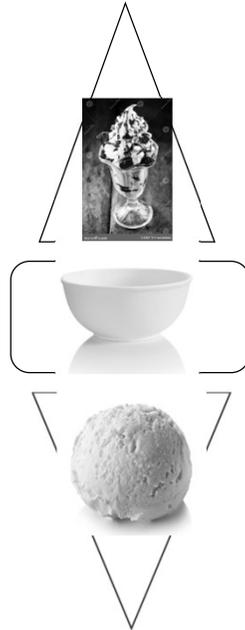
The Experience Continues...



Joshie the Giraffe!

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The Experience Continues...

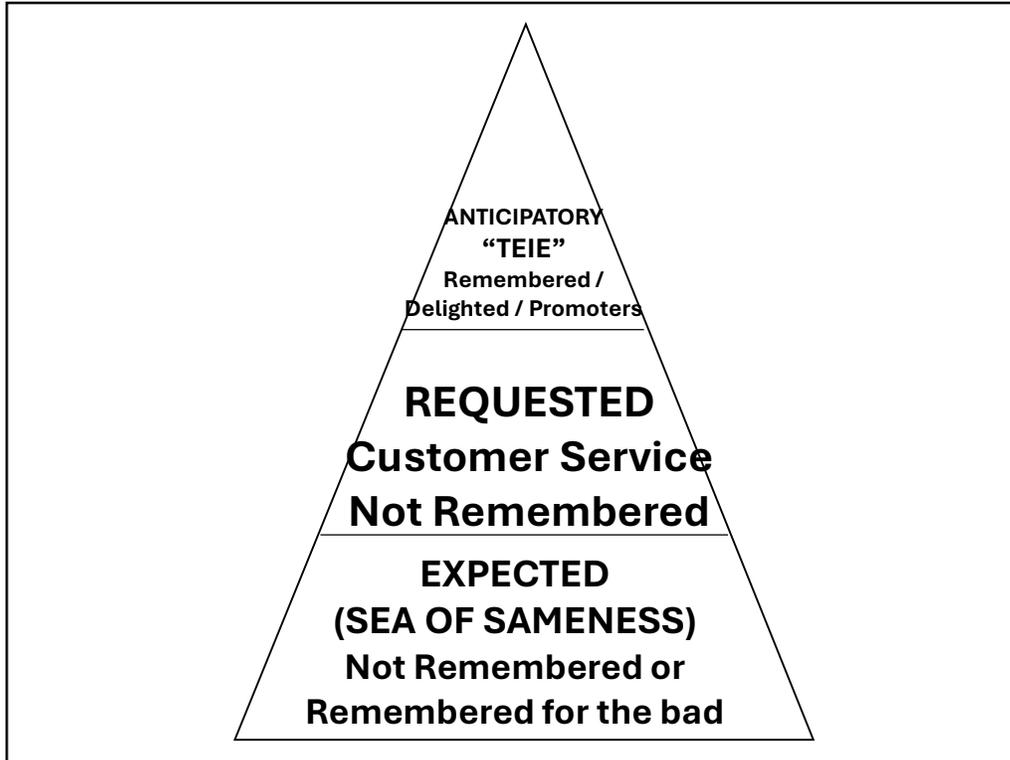


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Emotional Engagement Principles Ritz Carlton

1. Keep it Streamlined
2. Create Defining WOW Moments
 - Legendary and Essential
3. Engage the Senses
4. Focus on the Details
5. “Let us Stay with You”

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The Experience Continues...

When customer service is consistently exceptional...

68% of residents are Promoters – “Just ask and I will help!”

Only 13% are Detractors

89% of residents family members are Promoters – “Anything I can do to tell others what their futures will look like here at XXX, I am happy to do!”

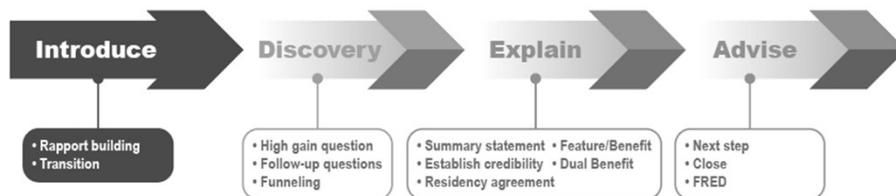
There was a direct correlation between high occupied communities (92%+) and Net Promoter Score (NPS)

Activated Insights – Q3 - '24 to Q2 - '25

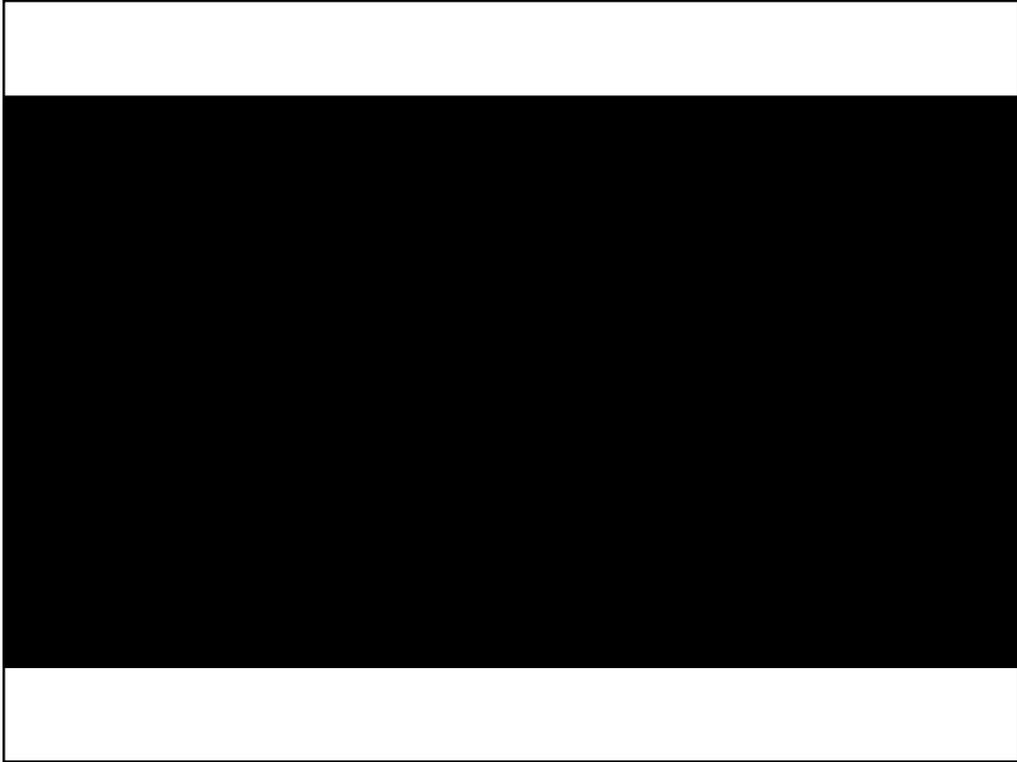
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Overview of the **IDEA Sales Process**

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Drew Dudley Leading with Lollipops



<https://youtu.be/uAy6EawKKME?si=MH6nibJWX2I2wSn4>

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***When we Treat What
we***

Do as a Craft

**November 30, 2024
(handcut)**



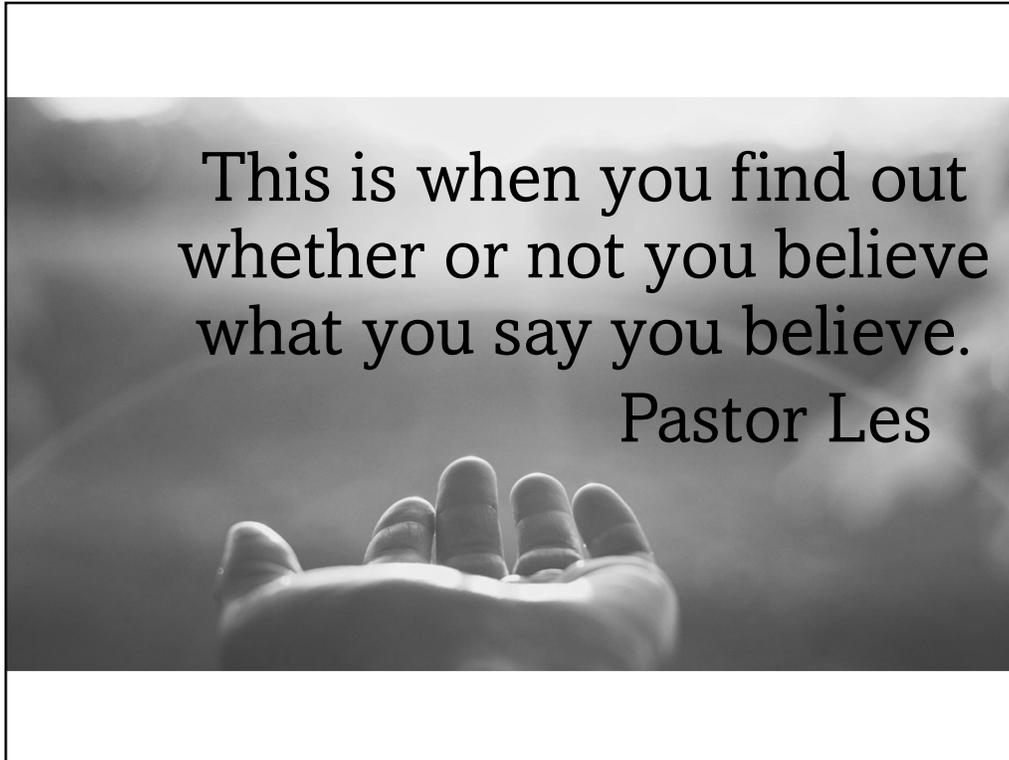
admiredleadership.com

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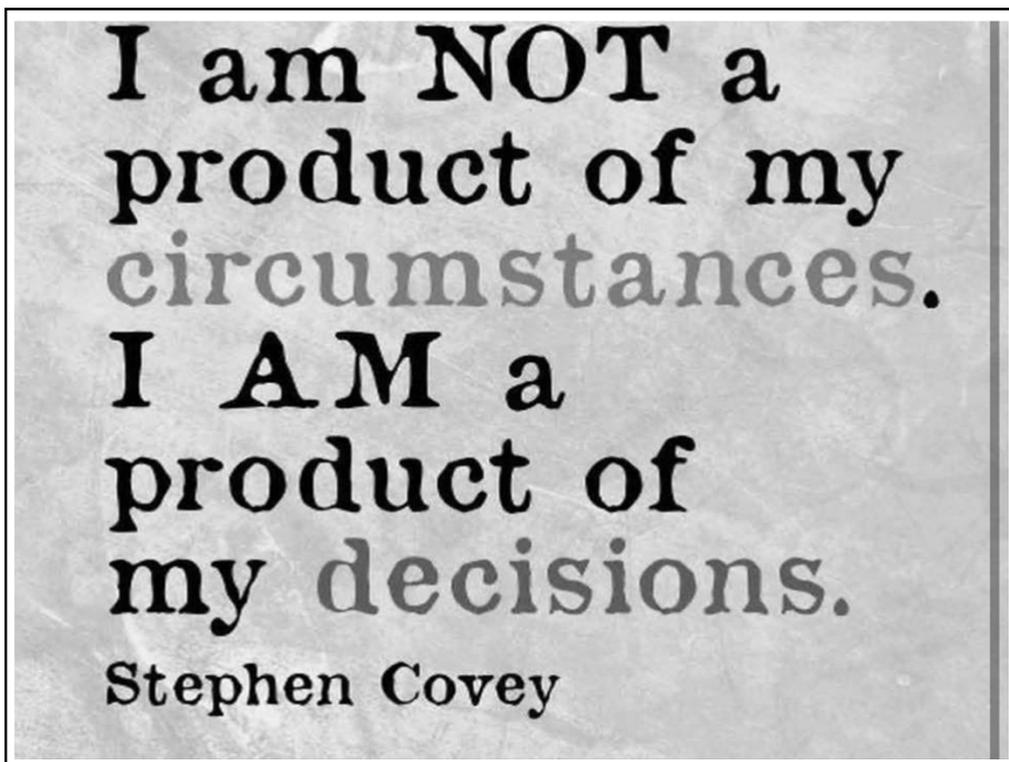
COMMITMENT



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Michael Marlow

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502.386.0005

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The 10 11 Bs!
Change your Behaviors, Change your Life!

1. Be atypical - no Sea of Sameness for you!
2. Be a holistic listener
3. Be disciplined and consistent in professional and personal lives
4. Be about results, not activities
5. Be focused on investing Time/Skills vs Velocity/Volume
6. Be a Lone Nut or a First Follower
7. Be all about Personal Connections and Team Selling
8. Be true to treating every customer/situation as unique
9. Be committed to your 8 Standards – every time, every day, every customer
10. Be proud to be an atypical salesperson - Transform!

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Michael
Marlow

Thank You
NDLTCA Heroes!