

# Argentum Senior Living Sales Counselor Certificate Program – Domains of Study

## Industry Knowledge

A. Service options that meet the wants and needs of prospects, families, and/or responsible parties.

Knowledge of:

1. Independent living, assisted living, memory care, skilled nursing, home care, hospice care, and staying home with no services
2. Federal and state regulations and organization-specific criteria (e.g., move-in/admission and move-out/discharge documentation requirements, Fair Housing, end-of-life requirements, Fair Labor Standards, Health Information Portability and Accountability Act requirements)
3. Assessment process
4. Pricing models (i.e., private pay, long term care insurance, private insurance, Veterans Administration benefits, Medicare, Medicaid)

B. Common diseases and conditions that affect senior living decision making

Knowledge of:

1. Dementia
2. Chronic Obstructive Pulmonary Disease
3. Congestive Heart Failure
4. Stroke
5. Diabetes
6. Parkinson's disease
7. Depression
8. Incontinence
9. Limitation in activities of daily living
10. Difficulty with ambulation
11. Vision loss
12. Hearing loss
13. Acute v. chronic conditions

### C. Industry statistics

#### Knowledge of:

1. Statistics for internal use and the implications of data for sales
2. Percentage of the US population diagnosed with dementia
3. Average length of stay by care level
4. Average revenue per unit
5. Average sales cycle, company benchmarks for visits, calls, outreach
6. State survey results
7. Clinical Outcomes
8. Readmission rates (e.g., Accountable Care Organization Reform Act)
9. Statistics to be shared with consumers and the implications of data for sales
10. Percentage of the US population diagnosed with dementia
11. Longevity of the staff
12. Management years in the industry
13. Satisfaction survey results
14. Company history, organization, and other details

## Marketing Strategy

- A. Articulate the organization's place in the market in comparison with competitors in order to position the organization appropriately, differentiate services, and sell products effectively.

#### Knowledge of:

1. Demographics (e.g., age, income, gender, location)
  2. Strategies and rules for collecting information about competitors (e.g., relationship building, exploratory interviewing, antitrust considerations)
  3. Analysis of strengths, weaknesses, opportunities, and threats
  4. Pricing models (e.g., all-inclusive pricing, ala carte, service levels, price-per-point) and how they work
- B. Formulate strategic outreach, sales, and marketing plans working closely with other departments to ensure census growth.

#### Knowledge of:

1. Components of a marketing plan
2. Types of referral sources
3. Role of departments (e.g., nursing, maintenance) in a marketing plan
4. Professional partnerships

- C. Support the organization's market presence by having a basic understanding of media channels in order to reach target audiences for increased lead generation.

Knowledge of:

1. Media channels (e.g., print publications, direct mail, digital marketing, social media, radio, television)
2. Targeted demographics (e.g., age, income, location)
3. Collateral material

- D. Monitor marketing budgets by analyzing plans and results in order to forecast accurately and use available resources to generate new business.

Knowledge of:

1. Strategies for managing a marketing budget
2. Financial terms and reports (e.g., revenue, expense, actual v. budget)

## Consultative Sales Process

- A. Execute a professional outreach program by building relationships and demonstrating outcomes to drive qualified referrals and reciprocity.

Knowledge of:

1. Sales cycle (e.g., education, pre-call planning, post-call review, overcoming objections)
2. Strategies for making effective presentations (e.g., partnering with clinical personnel, information hierarchy)
3. Identification, qualification, development, maintenance, and evaluation of professional partnerships

- B. Discover prospects and families' needs, wants, and resources by building rapport and asking effective questions in order to identify potential solutions.

Knowledge of:

1. Guiding principles (e.g., resident rights, person-centered care, personal empowerment, boundary issues, ageism)
2. Identification of needs and wants (e.g., situation, problem, strengths, interests, open-ended and close-ended questions)

3. Management of interpersonal dynamics of decision makers (e.g., active listening, conflict resolution)

C. Identify solutions by matching the identified needs and wants to the features and benefits of signature programs and services in order to advance sales.

Knowledge of:

1. Strategies for matching needs and wants to features and benefits of signature programs and services

D. Demonstrate the value of recommended solutions by articulating how they meet the needs of prospects and families in order to advance sales.

Knowledge of:

2. Strategies for making effective presentations
3. Role of all disciplines in communicating the value of proposed solutions

E. Provide appropriate follow up for prospects and families using a lead tracking system in order to advance the sales process and gain commitment.

Knowledge of:

1. Components of tracking systems
2. Creative follow up (e.g., invite to event, assessment, home visit)
3. Importance of data entry in lead tracking systems
4. Identification of lead status and appropriate timelines for follow up

F. Close sales through the execution of financial commitments in order to meet customer needs and business goals.

Knowledge of:

1. Strategies for overcoming objections
2. Closing techniques (e.g., how and when to ask for the sale)
3. Components of contracts and/or other agreements

G. Initiate opportunities for improvement in performance by analyzing key sales metrics in order to improve outcomes.

Knowledge of:

1. Conversion ratios
2. Interpretation of trends in performance
3. Root cause analysis
4. Identification of strengths and areas of opportunity
5. Implementation of solutions

H. Facilitate positive relationships with all departments in a respectful and collaborative manner in order to solve problems and promote a robust sales culture.

Knowledge of:

1. Group dynamics
2. Strategies for effective collaboration
3. Strategies for conflict resolution
4. Identification of employee training needs (e.g., importance of first impressions, sales 101, inquiry call training, customer service)