

THE ONLY ADVANCED CONFERENCE OF ITS KIND!!

12TH ANNUAL EVENT  
ALL NEW TOPICS!!

# THE 2008 ADVANCED SALES & MARKETING SUMMIT FOR

# SENIORS HOUSING, ASSISTED LIVING AND NURSING INDUSTRIES

"WHY PROFESSIONAL SELLING IS THE ANSWER AND MOST DON'T GET IT."

DEC. 8-9, 2008

RITZ CARLTON BEACH RESORT & SPA

NAPLES, FL

★ ★ ★ ★ ★  
"YOU ARE AT A  
DISADVANTAGE IF  
YOU DON'T ATTEND  
THIS CONFERENCE.  
IT IS THE BEST ONE  
I ATTEND."

JACK McCARTHY  
Senior VP of Sales  
and Marketing  
Benchmark  
Assisted Living

#### ASSOCIATION AND INDUSTRY SPONSORS:

- American Seniors Housing Association
- Assisted Living Federation of America

#### CORPORATE SPONSORS:

- One On One Service to Seniors
- Roche Associates
- REPS Leads by MDI Achieve
- Moore Diversified Services
- Total Census Solutions

#### LEARN FROM THESE PROS:

• Dan Madsen	CEO, Leisure Care
• David Smith	Partner, One on One/One McKnight Place
• Aaron D'Costa	VP of Customer Loyalty, Pathway Senior Living
• Peggy Gollither	President, Veterans Help Analysts, LLC
• Mike Hargrave	VP, NIC MAP™ Data and Analytical Service
• Rick Hunsicker	President, Hunsicker Consulting
• John Makowski	Creative Director, Erickson Communities
• Tony Mullen	Partner, Royal Star Properties
• Joe Roche	CEO, Roche Associates
• Jayne Sallerson	Vice President, Marketing, Emeritus
• Richard Seppala	Partner, Total Census Solutions
• Edie Smith	Senior Vice President and Director of Research, ProMatura Group

#### GAIN FROM THESE TOPICS:

- ❓ New Ideas to Facilitate Home Sales
- ❓ Best Practices in Using Web Sites and the Internet
- ❓ New Research on What Customers Value
- ❓ "Motivational Interviewing" —  
An Advanced Sales Technique
- ❓ New Research on Independent Living Residents
- ❓ How to Create "BUZZ" About Your Community

ALL NEW TOPICS!! EARLY BIRD REGISTRATION IS OCTOBER 30TH.

## TESTIMONIALS ABOUT PAST CONFERENCES

"The Advanced Sales and Marketing seminar that Tony Mullen offers each year is in my opinion your best opportunity to learn what is really going on in the senior living industry from a sales and marketing perspective. It is the most advanced, innovative, factual, fun and creative program offered for senior living sales leaders and sales professionals today. Don't miss it!"

— **Jack McCarthy**, Senior Vice President Sales and Marketing, Benchmark Assisted Living

"We were truly impressed with the advanced level of this Conference and the number of best practice techniques presented. A lot of conferences make promises; this one delivers. We took home many new ideas to implement immediately. We will be back this year, and bring even more of our sales and marketing people. You are at a disadvantage if you don't attend."

— **Tana Gall**, Senior Vice President of Marketing, Leisure Care

"This is an outstanding conference designed by marketing and sales professionals for marketing and sales professionals. The investment you make by sending your salespeople to this conference will be paid back with an incredible return on your investment. We continue to use material from previous conferences in our corporate sales training. We would not miss this conference."

— **Tom Baker**, Senior Vice President of Marketing, Country Meadows

"We are a walking billboard for the incredible value of this conference. The increased occupancy results as a result of attending last year's conference were simply amazing. We were stuck at 35% for 24 months. We then attended this conference and applied many of the techniques taught. We then leased 90 units in 12 months."

— **Jerry Stout**, Partner, Wellington Group

"We have achieved extraordinary sales results from virtually every technique we learned at last year's conference."

— **Loriann Putzier**, COO, IntegraCare

## 2008 LETTER FROM CONFERENCE CHAIRMAN

I am delighted to report that this Conference continues to grow each year as the word spreads about the unique, advanced content presented. Those of you who know me, can take solace in the fact that I do not rest on the past successes of this Conference, but continually look for the very best ideas in sales, marketing and strategy – wherever I can find them. In addition to researching these ideas, I put them into practice every day with the new communities that I continue to develop, market and sell. So I know a "best practice" works in the real world, if I am recommending it at this Conference.

After several years on the West Coast, we are back in Florida at one of the nicest hotels in the Country.

So, please plan a few extra days and enjoy the beautiful location on the beach in Naples, Florida (It is hard to match the room rate that I have negotiated!).

We continue to believe and emphasize that every professionally marketed property should be at 100% average occupancy with no lost revenue days (unless revenue management is more profitable), even in this softer economic environment.

I am grateful to our speakers and sponsors. Our mission is to produce the most advanced and technically sophisticated Conferences in our industry that answer the pressing questions of experienced professionals. Our past attendees have unanimously agreed that we have met the goal. I look forward to meeting you at this year's Summit as we help to improve the lives of American seniors. Do you know of a career where you can touch so many lives for the better over such an extended period of time?

Sincerely,  
**Anthony J. Mullen**  
 President, Best Practice Seminars  
 Partner, Royal Star Properties

# CONFERENCE AGENDA:

## DAY ONE

**OPENING SESSION**

8:30 – 9:15 AM

**CONTINENTAL BREAKFAST SPONSORED BY MOORE DIVERSIFIED SERVICES**

9:15 – 10:00 AM



**BREAK**

10:00 – 10:20 AM

**SPONSORED BY REPS LEADS BY MDI ACHIEVE**

10:20 – 11:00 AM

### **PRODUCING GREAT SALES RESULTS: WHY PEOPLE WANT TO BE PERSUADED**

**PRESENTER:** ANTHONY J. MULLEN, PARTNER, ROYAL STAR PROPERTIES

No matter the economic and housing markets, potential customers continue to inquire and want to be persuaded. Mr. Mullen has been in the trenches as well as tracking the key industry sales metrics for many years. He has also studied the leading practioners of the science of influence and persuasion and how this science can be applied to our industry, as well on the need for and make up of professional sales people.

In this unique presentation, he will reveal how the best companies apply these principles to produce great sales results in any economic environment, including a number of original recommendations never shared before. He will also share best practices in helping customers sell their homes.

### **A MAJOR ROOT CAUSE OF POOR RESULTS: WHY HANDLING PHONE CALLS MUST CHANGE**

**PRESENTERS:** JAYNE SALLERSON, VICE PRESIDENT, MARKETING, EMERITUS  
RICHARD SEPPALA, PRESIDENT, TOTAL CENSUS SOLUTIONS

Mr. Seppala has pioneered the use of sophisticated software to track every call into your communities. Preliminary results were presented last year. He is back by popular demand to present a much more comprehensive look at how poorly we handle incoming calls, and what we can do better master this critical task. "Few Sales are Made on the First Call; But Many are Lost".

Ms. Sallerson will detail her results using the software system. What has Emeritus learned? Would she do it again?

### **STRATEGIC MARKETING AND PLANNING: INSIGHTS FROM THE DATA**

**PRESENTER:** MIKE HARGRAVE, VICE PRESIDENT AND DIRECTOR OF NIC MAP™

Are you armed with the market intelligence you need to effectively position and sell your product/property/service? Join Michael Hargrave, VP, NIC MAP™ as he helps you tap into the seniors housing industry's premier database of property level performance information. From quarterly data collected on over 12,500 properties, Mr. Hargrave will give you a view of current trends and insights you need to drive your business forward. Quickly gain knowledge of what types of properties and unit mixes will best position you for success, which markets present opportunities and what lies ahead for the seniors housing & care industry. Think the growth in seniors households is the answer? Mr. Hargrave will demonstrate the real path to success in our industry.

11:00 – NOON



**LUNCH**

NOON – 1:15 PM

**BOX LUNCH**

1:15PM – 2:15 PM

2:15PM – 3:15 PM



**BREAK**

3:15 – 4:05 PM

4:05 – 4:45 PM



**COCKTAILS**

5:00 – 6:00 PM

**SPONSORED BY  
ONE ON ONE  
SERVICE TO  
SENIORS**

**MAXIMIZING YOUR WEBSITE AND THE INTERNET:  
WHAT ARE THE BEST DOING DIFFERENTLY?**

**PRESENTERS:** **JOHN MAKOWSKI**, CREATIVE DIRECTOR, ERICKSON COMMUNITIES  
**EDIE SMITH**, SENIOR VICE PRESIDENT AND DIRECTOR OF RESEARCH, PROMATURA GROUP

Erickson Communities continues to set sales records in the CCRC field, and has one of the most advanced internet strategies and websites in the industry. Mr. Makowski oversees this effort and will share their approach in detail.

Ms. Smith has done the most comprehensive study on websites and internet strategies for both independent living and assisted living companies. She will present the results of her study including what specific techniques have been most productive in producing new leads.

**CREATING & CAPTURING INCREASED SALES  
IN YOUR SENIOR LIVING PRODUCTS: TRANSLATING CONSUMER  
MARKET RESEARCH INTO PROVEN MARKETING INITIATIVES DESIGNED  
TO EXPEDITE FILL-UP OR ENHANCE OCCUPANCY**

**PRESENTER:** **JOE ROCHE**, PARTNER, ROCHE ASSOCIATES

This unique marketing session shares how the results from original consumer market research for both independent living and assisted living communities from across the country was utilized to create increased market demand for senior living communities. The invaluable information to be offered includes findings and conclusions from original market research conducted with thousands of existing and prospective senior living residents regarding the reasons why and the “market drivers” leading them to decisions about moving into given senior living communities. More importantly, during the session, marketing and promotional materials developed as a result of this consumer market research will be presented, along with case studies of projects which exceeded their fill-up projections or dramatically enhanced their occupancy due to utilizing these materials.

**HOW GIVING TO PROSPECTS PRODUCES MORE SALES...**

**PRESENTERS:** **PEGGY GOLLIHER**, PRESIDENT, VETERANS HELP ANALYSTS, LLC  
**ANTHONY MULLEN**, PARTNER, ROYAL STAR PROPERTIES

Imagine obtaining \$500,000 in extra yearly income for your prospects. Do you think that might endear them to you and your community? Yes, it is true you can do this, and Ms. Gollieher will show you how to use the Veterans Program to help prospects and residents obtain income they are entitled to receive, which can be used to help them afford your community.

Mr. Mullen will describe how you can help prospects improve their investment income and their health and longevity. He will review the movement toward formal wellness plans and how you can maximize their benefit in sales.

**ADVANCED NETWORKING AND OUTREACH:  
STRATEGIES TO GENERATE MORE REFERRALS**

**PRESENTER:** **AARON D’COSTA**, V. P. OF CUSTOMER LOYALTY, PATHWAY SENIOR LIVING

Many companies benchmark their sales efforts, looking at leads generated, call volume, personal visits, and move-ins. Few closely examine and benchmark the outreach efforts being conducted. As Vice President of Customer Loyalty for Pathway Senior Living, Mr. D’Costa knows about the importance of building referral relationships in order to strengthen your brand and create positive, memorable experiences for customers, whether those customers are residents, families or professionals. Mr. D’Costa will share Pathway’s strategy for evaluating the company’s community relations (outreach) efforts. With his 18 years in the industry, Mr. D’Costa will also provide insight into understanding the key needs of referral sources, developing mutually beneficial strategic partnerships, and identifying hidden sources for referrals.

**DAY TWO**

**OPENING SESSION**  
8:30 – 9:15 AM

<b>MOTIVATIONAL INTERVIEWING AND OTHER ADVANCED SALES TECHNIQUES</b>	
<b>PRESENTER:</b>	<b>DAVID SMITH</b> , PARTNER, ONE MCKNIGHT PLACE CEO, ONE ON ONE SERVICE TO SENIORS

Mr. Smith has been the pioneer of great sales results in the industry, and he continues to raise the bar by learning and applying proven principles from psychology and social science, both in his own projects and by helping clients. Motivational interviewing is a proven science that demonstrates how people persuade themselves to change long held behaviors and beliefs, which our prospects struggle with in the process of looking at our communities.

Mr. Smith will also update the advanced techniques he has presented at previous summits, including the need to understand the motivating forces of legacy and control. Mr. Smith continues to produce the highest closing ratios of any company we know.

9:15 – 10:00 AM

<b>THE CEO PERSPECTIVE: WHAT WORKS</b>	
<b>PRESENTER:</b>	<b>DAN MADSEN</b> , CEO, LEISURE CARE

Leisure Care has been one of the few companies to create a unique brand for the company and its properties. Mr. Madsen understands the importance of marketing and how to differentiate his communities from the competition.

In this high energy presentation, you will hear his best ideas that have helped propel his company to become a clear leader in the field, with evidence for a real brand.

Leisure Care manages both independent and assisted living apartments in over 40 communities in western states and Canada. The company has won numerous awards and Mr. Madsen is widely recognized as one of the most dynamic leaders in the field today.

Mr. Madsen will also describe their approach to service at their communities, and how they make it stick at the team member level.



**BREAK**  
10:00– 10:20 AM  
**SPONSORED BY ROCHE ASSOCIATES**

10:20 – 11:00 AM

<b>HOW TO EXECUTE WORD OF MOUTH/BUZZ FOR YOUR COMMUNITY</b>	
<b>PRESENTER:</b>	<b>RICK HUNSICKER</b> , PRESIDENT, HUNSICKER CONSULTING

There is a science to how to implement a word of mouth campaign for your community. Word of mouth can be the most valuable form of advertising if it is implemented properly and if you have the evidence to back your claims/positioning. Mr. Hunsicker has over twenty years of sales and marketing experience in our field and will share how he is using the landmark work of George Silverman on word of mouth campaigns. While word of mouth is not free, it is a low-cost way to generate exceptionally qualified leads and become the community of choice in your local market. He will also demonstrate the importance of looking at your community through the eyes of outsiders, which is a major blind-spot for many communities in being authentic and backing up their branding and positioning claims.

**PANEL/AUDIENCE QUESTIONS**

11:05 AM – NOON

<b>PANEL DISCUSSION</b>	
<b>MODERATOR:</b>	<b>ANTHONY MULLEN</b> , CPA
<b>PANELISTS:</b>	AARON D’COSTA, PEGGY GOLLIHER, MIKE HARGRAVE, RICK HUNSICKER, DAN MADSEN, JOHN MAKOWSKI, JOE ROCHE, JAYNE SALLERSON, RICHARD SEPPALA, DAVID SMITH, EDIE SMITH

**CONCLUSION OF CONFERENCE**

This is your chance to ask specific questions in a group setting. Some panelists will be available afterward for one-on-one sessions.

**BEST PRACTICE SEMINARS, INC.**  
C/O CONFERENCE MANAGEMENT  
3527 TWISTED TREE LANE  
JACKSONVILLE, FL 32216

**PRESORT  
FIRST CLASS  
U.S. POSTAGE  
PAID**

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**JACK McCARTHY**  
Senior VP of Sales  
and Marketing  
Benchmark  
Assisted Living

**CONFERENCE — REGISTRATION FORM**

Please register the following delegate for "The 2008 Senior Housing, Assisted Living and Nursing Industries Advanced Sales and Marketing Summit"

Mr./Mrs./Ms.: \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

*(for registration confirmation only)*

Payment enclosed (please make check payable in U.S.funds to Best Practice Seminars, Inc. and enter your check number here \_\_\_\_\_)

Please charge by credit card:

VISA  MasterCard  American Express

Card Number \_\_\_\_\_

Exp. Date \_\_\_\_\_

Signature \_\_\_\_\_

**FOR OFFICE USE ONLY:**

DATE RECEIVED: \_\_\_\_\_

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**2 EASY WAYS TO REGISTER:**



FAX THIS FORM TO: 866-207-0256 (secure line)



OR MAIL TO: BEST PRACTICE SEMINARS, INC.  
C/O CONFERENCE MANAGEMENT  
3527 TWISTED TREE LANE  
JACKSONVILLE, FL 32216

**CONFERENCE VENUE:**

**Ritz Carlton Beach Resort**  
**280 Vanderbilt Beach Road**  
**Naples, FL 34108**  
**239-598-3300**

**Special Hotel Rates are Available Until October 30th**

**REGISTRATION FEE:**

**\$1,095** per person. **\$995** if received prior to **October 30th 2008**. Discounts are available for more than 3 attendees from the same company. Please call **610-853-9801** for rates. Hotel rates are separate. Please make hotel reservations early. **HOTEL WILL SELL OUT!** Please do not send the conference registration form to the Hotel, but to the fax number or address for Conference Management listed above.

**HOTEL INFORMATION AND CANCELLATIONS:**

To secure reservations at a special group rate of **\$229** per night at the Ritz Carlton Beach Resort call **888-856-4380** and **ask for the group rate for Best Practice Seminars**. You must call by October 30, 2008 to get the group rate. There are several other hotels in the immediate area or check hotels.com. The Ritz Carlton Beach Resort is 45 minutes from the Fort Myers Airport. Renting a car may be your best option. The hotel will sell out, so please make hotel reservations early! Should you be unable to attend, a refund less a **\$195** administrative charge will be made for cancellations received in writing before **November 14, 2008**. No refunds will be made for cancellations after this date. Substitutions may also be made up to **November 21, 2008**.