



National Church Residences

## Does Your Organization Need a Marketing/Sales & Business Development Overhaul?

Margaret Gibson, PT, MPT  
Vice President of Marketing and Sales



### Key Components

Listen and Learn

Strategy

Expectation

Tools

Structure

Engagement





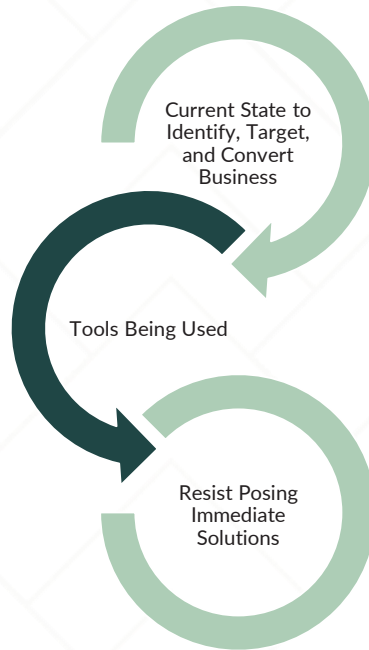
# People

- ❖ Current Team and Superpowers
- ❖ Leaders – Official and Unofficial
- ❖ Expectations of Marketing and Sales
- ❖ Obstacles and Opportunities
- ❖ 3<sup>rd</sup> Party Support



  
National Church Residences

# Process





# Focus and Strategy

## Define Focus

- ❖ Each Product/Service Line Focus Aligned with Org
- ❖ Senior Living – Occupancy Generators
- ❖ Services – Referral Network and Targets
- ❖ Marketing – Brand, Voice and Story, Lead Gen
- ❖ What Moves the Needle with Greatest ROI?
- ❖ *“Guardian of the Focus”*

## Collaborate with Team

- ❖ Team Insights
- ❖ Define the Why?
- ❖ Internal Buy In and Timing is Key



National Church Residences

Maximize Current  
Opportunities – Foundation

Plan to minimize  
business “leakage”

Inside Out Approach  
– “Deep then Wide”



# Accountability & Tools



## What Does Success Look Like?

- ❖ Organization, Division, and Team Goals
- ❖ Individual Role Goals



## Tools for Success



- ❖ Standardize and “*Memorialize*” for Scale
- ❖ Training to Meet Expectations of Role
- ❖ Examples:
  - ❖ Incentive Toolbox
  - ❖ Reporting and Data Use
  - ❖ Role and Responsibilities
  - ❖ Onboarding



## Accountabilities

- ❖ Require Standardized and Data Driven Consistent Reporting
- ❖ Establish Cadence of Group and 1-1 Meetings
- ❖ Set Expectation of Leadership Involvement
- ❖ Empower Team to Ask for Follow Up
- ❖ Written Coaching and Follow Up
- ❖ Recognize Successes



National Church Residences



## Team Structure

### Sales

## Senior Living

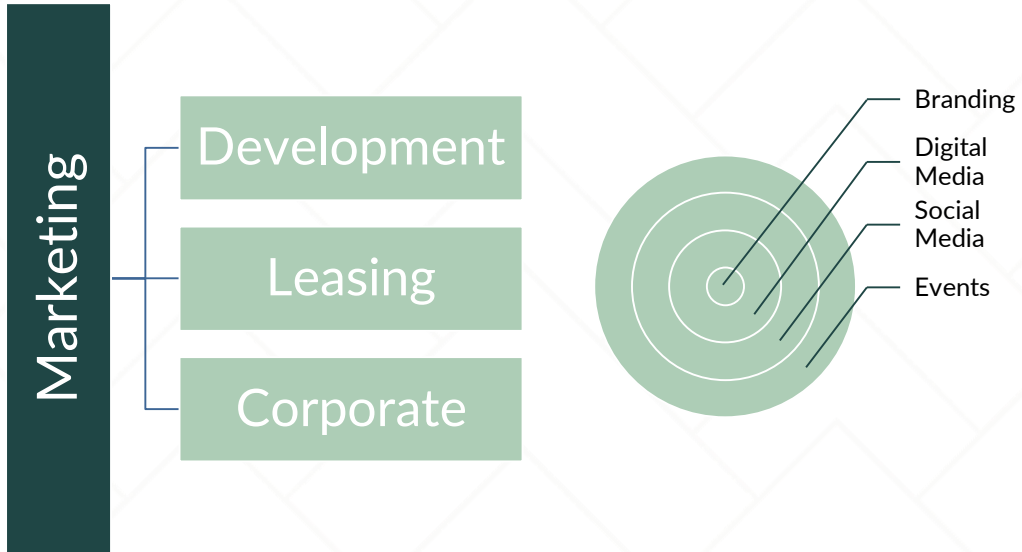
- ❖ Divisional Leader – Director of Sales
- ❖ Regional Based on Portfolio– Sales and Operations Specialist
- ❖ Community Based Sales Consultant

### Sales

## Senior Services

- ❖ Regional based on Geography
- ❖ Task Force
- ❖ Subject Matter Experts
- ❖ Sell Continuum





### Communications

## External & PR

- ❖ Media Engagement
- ❖ Crisis Management

### Communications

## Internal

- ❖ Employee Communication
- ❖ Mission Story Telling



## Compensation Structure

- ❖ Market Adjustments & Considerations
- ❖ Incentive Plan Review & Revisions



## Employee Evaluations

Promotions

Turnover and Narrowed Scope

Right Person Different Seat

New Seat Created

Empower Current and Emerging Leaders



# Engagement



## Celebrate the WINS

- ❖ Recognize Wins tied to Team and Individual Goals
  - ❖ Example – Occupancy Boosters, Kickers
- ❖ Recognize with Peers and Leaders



## Cross Selling



# Operations Collaboration

- ❖ Critical Sales Strategy Communication and Alignment
  - ❖ Example: wholistic approach to occupancy and conversion of services business
- ❖ Regular Formal and Informal Touch Bases
- ❖ Sales Zone vs Admin Time
- ❖ Updates with Sales Impact Considered
- ❖ Engagement and Sales Training for Support Team



# THANK YOU

