

THE ONLY ADVANCED CONFERENCE OF ITS KIND!!

13TH  
ANNUAL EVENT  
ALL NEW TOPICS!!

THE **2009** ADVANCED SALES

& MARKETING SUMMIT FOR

SENIORS HOUSING, ASSISTED LIVING

AND NURSING INDUSTRIES

"HOW DOES YOUR SALES TEAM MEASURE UP TODAY?"

DEC. 7-8, 2009

RITZ-CARLTON BEACH RESORT & SPA

NAPLES, FL



"I continue  
to send my entire  
sales team for our  
Allegro communities...  
the ROI is exceptional"

SUE LUBER,  
VP, Sales,  
Love Management



**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
- The Senior Care Investor/  
Irving Levin Associates

**LEARN FROM THESE PROS:**

- **Rick Banas** VP of Operations, BMA Management, Ltd.
- **Tim Buchanan** CEO, Legend Senior Living
- **Liz Bush** Senior VP of Marketing and Sales, Life Care Services
- **Aaron D'Costa** VP of Marketing and Business Development, Pathway Senior Living
- **Dan Hermann** Senior Managing Director & Group Head, Ziegler Capital Markets
- **Matt Jespersen** VP of Sales and Marketing, Courtyard Senior Living
- **Matthew Jurmann** CEO, Chromatic Sites
- **Marla Lopeman** Senior VP, Legend Senior Living
- **Tracy Lux** President, Trace Marketing
- **Donna McAleer** CEO, Elant, Inc.
- **Jack McCarthy** Former Senior VP of Sales and Marketing, Benchmark Assisted Living
- **Blair Minton** Chairman, BMA Management, Ltd.
- **Tony Mullen** Partner, Royal Star Properties
- **Matt Rix** Principal, Mattrixx Presentations
- **David Smith** Partner, One on One/The Gatesworth
- **Margaret Wylde** CEO, ProMatura Group

**GAIN FROM THESE TOPICS:**

- ? How to Use Authentic Stories
- ? New Ideas to Facilitate Home Sales
- ? Best Practices in Using Web Sites and the Internet
- ? New Research on What Customers Value
- ? Understanding Self-Persuasion Techniques

**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

## 2009 LETTER FROM CONFERENCE CHAIRMAN

It will be hard to move this conference from one of the nicest hotels and spas in the world, especially with the group price we have negotiated. The sunsets over the water alone are worth the trip to the beach in Naples, FL, and when accompanied with your favorite beverage (Neyers Chardonnay 2007 would be a great choice) and discussion about how to get or stay fully occupied well, — it just doesn't get any better.

I am proud to say we continue to raise the bar for professional selling with 80% new speakers from last year and brand new topics of a truly advanced nature. After all these years, I still cannot hear enough from David Smith. He continues to amaze me with his results and by taking on new and better approaches to the professional sales discipline. He is a shining star, and I'm proud to give him this venue to share his wisdom, passion and professionalism.

Professional selling that produces well above average ratios of sales to visits remains the Holy Grail that most communities either don't realize, realize but ignore or simply are not willing to invest in.

I know from my own experience (10.5 net move-ins per month over the first 10 months of occupancy as I write this) that the techniques we teach work — period — serious recession or no serious recession. I urge you to look at the ROI of professional education for sales associates; I know of no higher ROI for any investment.

If your occupancy is below 94%, it is hard to justify not making some investment in professional selling. The recession will likely last through 2010; there has never been a time like the present to take charge of your future.

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 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 – 9:45 AM

CONTINENTAL BREAKFAST SPONSORED BY MOORE DIVERSIFIED SERVICES

9:45 – 10:45 AM



### BREAK

10:45 – 11:05 AM

SPONSORED BY REPS LEADS BY MDI ACHIEVE

11:05 – NOON



### LUNCH

NOON – 1:15 PM

BOX LUNCH

1:15 – 2:05 PM

## FACTS TELL BUT AUTHENTIC STORIES SELL

**PRESENTER:** MATT RIXX, PRINCIPAL, MATTRIXX PRESENTATIONS

Skeptical that authentic stories can be the most influential technique that you can use in your presentations? You will not be after you listen to one of the country's leading experts on the use of stories in sales presentations. Matt Rixx has spoken before hundreds of business and sales groups about the power of stories to connect with a listener and move them to adopt your point of view. Matt will demonstrate this truth through several powerful stories in his presentation. Later in the program, he will conduct a workshop to show you specific tools to help you create your own authentic stories to use to help prospects see the truth of the benefits to moving to your community, and the loss they will experience by not moving.

## SELF PERSUASION: HOW TO MASTER THE ART AND SCIENCE OF HELPING PROSPECTS CONVINCING THEMSELVES TO MOVE

**PRESENTER:** DAVID SMITH, PARTNER, ONE ON ONE/THE GATESWORTH

David delivered a brilliant presentation at last year's conference demonstrating the use of this powerful method of working with prospects, in addition to using the motivating issues of legacy and control that most prospects have deep within them as unspoken needs. David will expand on these key concepts with new material showing how he leased 42 apartments in 3 months in the depth of the recession at his rental community, which is one of the most expensive in the USA. David continues to be regarded by most industry executives as the best sales professional in the country, and we are proud to work with him in raising the bar for all sales professionals in the industry.

## THE POWER OF ON-SITE EVENTS: HOW TO RUN THEM MORE OFTEN AT THE LOWEST COST

**PRESENTER:** AARON D'COSTA, VP OF MARKETING & BUSINESS DEVELOPMENT, PATHWAY SENIOR LIVING

Pathway has developed a unique series of on-site events that allows them to put on over 40 different educational and cultural programs. On-site events that people want to attend remain the best way to get interested prospects to visit, and many will come who otherwise won't set a one on one appointment. Aaron will share the details of how Pathway has built such a large number of events that can be run by a small company, including the typical cost, logistics and other issues you need to know in order to take advantage of this successful strategy. Most communities simply don't have enough events due to a lack of good planning and creative thinking. Here is your opportunity to change that!

## ENTRANCE FEE PROJECTS: WHAT MUST YOU NOW DO... AND WHAT CAN RENTAL PROJECTS LEARN FROM THEM?

**PRESENTERS:** LIZ BUSH, SENIOR VICE PRESIDENT OF MARKETING AND SALES, LIFE CARE SERVICES  
DAN HERMANN, SENIOR MANAGING DIRECTOR & GROUP HEAD, ZIEGLER CAPITAL MARKETS

There is no question that many entrance fee projects are much harder to fill or keep filled than three years ago, but what is really going on? This session is designed to give you the truth based upon objective research conducted with top owners and marketers of entrance fee projects. What deals are being cut with depositors, how much in the way of monetary incentives is being offered, what unique programs are being used to help people sell homes, or to help prospects bridge the sale of their home? Certainly, some projects have been postponed and a few will need to be restructured, but the educated community with top sales people and best sales practices will make it through this trying period. Don't miss this opportunity to learn from the best and to separate fact from fiction.

2:05 – 2:55 PM

**BREAK**

2:55 – 3:15 PM

3:15 – 4:15 PM

## MANAGING SALES PROFESSIONALS: HOW TO PROPERLY FIND, TRAIN, MOTIVATE, COMPENSATE AND RETAIN THE BEST

**PRESENTERS:** **JACK MCCARTHY**, FORMER SENIOR VICE PRESIDENT OF SALES AND MARKETING, BENCHMARK ASSISTED LIVING  
**MATT JESPERSON**, VICE PRESIDENT OF SALES AND MARKETING, COURTYARD SENIOR LIVING

Two of the very best leaders of other sales professionals will share some of their best ideas to find, train and keep top sales professionals. The Industry still does not place enough emphasis and importance on sales talent, but in a recession with industry wide occupancy rates continuing to fall, sales talent is the difference between those that thrive and those that don't. Industry research has proven how poorly most communities sell, but the top professionals continue to keep their communities at or near 100% occupancy. This panel session will open your eyes to what is possible and how to implement ideas from some of the best selling organizations in the industry.

## HOW TO CREATE AUTHENTIC STORIES FOR YOUR SALES PRESENTATIONS

**PRESENTER:** **MATT RIX**, PRINCIPAL, MATTRIXX PRESENTATIONS

This workshop style presentation will help you learn techniques to create your own powerful stories for independent living and assisted living communities. Creating authentic stories requires real diligence and patience, weaving together your experience with actual residents, the emotional benefit from what you offer and actual testimonials from residents about their experiences. An authentic story pulls together the losses of not moving with the benefits of moving, by involving a prospect's emotions in a memorable way. A compelling story will be remembered by virtually all prospects, where most facts will simply be forgotten.

4:15 – 5:00 PM

**COCKTAILS**

5:30 – 6:30 PM

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

## HOW CEO LEADERSHIP AND DISCIPLINE PRODUCE OUTSTANDING SALES RESULTS

**PRESENTERS:** **TIM BUCHANAN**, CEO, LEGEND SENIOR LIVING  
**MARLA LOPEMAN**, SENIOR VICE PRESIDENT, LEGEND SENIOR LIVING

When the CEO "gets it," it dramatically improves the chance that above average sales results will occur. Legend has recently opened several properties with outstanding sales results. Sure, great site location helps, but Tim Buchanan of Legend has a very disciplined approach to how they produce such outstanding results. In this presentation, Tim Buchanan and Marla Lopeman will share the exact formula they use from the high level strategies to the day to day techniques, including teaching prospects how to convert life insurance into current assets to produce income. The right combination of lead generation approaches with professional selling produced 66 move-ins in one month in a recent project in Oklahoma City and over 20 move-ins per month in a recent project in Florida (yes Florida!).

## DAY TWO

**OPENING  
SESSION**

8:30 – 9:20 AM

## INDEPENDENT LIVING: USING THE NEWEST RESEARCH TO DOMINATE YOUR MARKET

**PRESENTERS:** **MARGARET WYLDE**, CEO, PROMATURA  
**ANTHONY MULLEN**, PARTNER, ROYAL STAR PROPERTIES AND SENIOR FELLOW, NIC

There is a substantial amount of research on independent living residents that is not well known, especially the newest research on independent living residents who have recently (within 6 months) moved into their community. This research differentiates between free standing independent living, independent living with assisted living communities and continuing care retirement communities, and allows one to understand many of the key reasons that people consider and choose an independent living community and why they choose the one they did. This research allows savvy communities to better tailor their marketing and sales messages and reduce the cost per lead and cost per move-in. Ms. Wylde and Mr. Mullen have been two of the leading researchers in the field over the last 20 plus years, and they will show you how to apply this research in a compelling and cost effective way based upon actual examples from existing independent living communities.

9:20 – 10:05 AM



**BREAK**

10:05– 10:25 AM

**SPONSORED BY  
ROCHE  
ASSOCIATES**

**HOW TO CREATE A UNIQUE WEBSITE AND WEB PRESENCE AT A COST-EFFECTIVE PRICE**

**PRESENTERS:** **MATTHEW JURMANN**, CEO, CHROMATIC SITES  
**AARON D’COSTA**, VP OF MARKETING & BUSINESS DEVELOPMENT, PATHWAY SENIOR LIVING

After listening to how one of the largest companies in the industry created a brilliant web strategy, Pathway decided to prove the same concepts could be implemented by the “little guys”. This presentation will demonstrate that many of the best internet ideas can be implemented at an affordable price, including creating personal, interactive e-mail for prospects. For families and referral parties, the Internet continues to grow in importance every day, and it is growing in importance to people over 75 years of age. This is a terrific opportunity to learn from a leader of an innovative, smaller company, and their consultant, who will walk through the details so you can execute a great web strategy at an affordable price.

10:25 –11:15 AM

**COMPETING ON PRICE: WHY AFFORDABLE ASSISTED LIVING IS PROFITABLE AND EASIER TO SELL**

**PRESENTERS:** **BLAIR MINTON**, CHAIRMAN, BMA MANAGEMENT, LTD.  
**RICK BANAS**, VICE PRESIDENT OF OPERATIONS, BMA MANAGEMENT, LTD.

“Affordable” assisted living is often in the eyes of the beholder. Some operators are leaving such state programs, but many are joining and prospering. Since it is very likely states will be making these programs more appealing to developers and operators, now is a good time to examine how they can work and work very well. Based upon success with 27 affordable assisted living projects in Illinois, BMA Management has jumped into a leadership position in this segment of the industry. The Illinois program will likely become a model for other states as several savvy, for-profit companies have indicated that it works for residents, owners and the State. This presentation will reveal the real numbers, strategies and know-how you must possess, including the differences in sales and marketing, in order to be successful. This is an excellent opportunity to take these facts to your state and make the case!

11:15 AM – NOON

**USING SPA AND SERVICE EXPERIENCES TO DIFFERENTIATE YOUR COMMUNITY**

**PRESENTERS:** **DONNA MCALEER**, CEO, ELANT, INC.  
**TRACY LUX**, PRESIDENT, TRACE MARKETING

Elant, a large provider of senior living communities has adopted the CALM methodology developed by Tracy Lux of Trace Marketing. The CALM approach is a signature branded system that provides a number of services including, aromatherapy, massage, meditation and sensory stimulation in a Spa setting. These elements can be used for independent, assisted, memory care and nursing home residents. Elant is using the program successfully and Donna McAleer will share the results of how this program has given them (USP) Unique Selling Premise, and increased resident, family, and staff satisfaction. Tracy Lux will share the thinking and specifics about adopting such a program, including issues you must consider such as, training, physical setting and marketing the program in order to be successful from a cost/benefit stand point.

END CONFERENCE

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

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

**THE 2009 ADVANCED SALES  
& MARKETING SUMMIT FOR  
SENIORS HOUSING, ASSISTED LIVING  
AND NURSING INDUSTRIES**

**DEC. 7-8, 2009 RITZ-CARLTON BEACH RESORT & SPA NAPLES, FL**

**"I continue  
to send my entire  
sales team for our  
Allegro communities...  
the ROI is exceptional"**

**SUE LUBER,  
VP, Sales,  
Love Management**

**CONFERENCE — REGISTRATION FORM**

Please register the following delegate for "The 2009 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.)

Please charge by credit card:

VISA  MasterCard  American Express

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

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

Signature \_\_\_\_\_

**FOR OFFICE USE ONLY:**

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

AMT. PAID: \_\_\_\_\_ METHOD: \_\_\_\_\_

**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:**

**\$1,195** per person. **\$995** if received prior to **October 30th 2009**. Discounts are available for more than 4 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, 2009 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, 2009**. No refunds will be made for cancellations after this date. Substitutions may also be made up to **November 21, 2009**.