

# Day To Day Sales and Marketing To Do List

**FIRST:** Find 14-16 facilities (skilled nursing, home health, hospitals, assisted living, independent living, etc.) in your area via [www.medicare.gov](http://www.medicare.gov) and [www.newlifestyles.com](http://www.newlifestyles.com) in your area and visit 8 facilities each day using the “Five Steps To Selling” approach in section 5 of your boot camp binder. Be sure you have the following at a minimum: 42 Flyers, VA Brochure, Standard Home Care Brochure, Business Cards, Presentation Folders, 8 foot Stand Up Banner, Lunch & Learn Presentation (for potential referral sources), Benefits of Home Care Presentation (for potential clients), VA Program Presentation. **Also, all of the sales and marketing training** you had at our in office boot camp is available online. Ask our [support@ahi-group.com](mailto:support@ahi-group.com) for a “UserID and Password to the online boot camp training.”

## **THEN:**

- 1) **Do you have the “VA” and “Care Services” videos** on your website and email signature? (Email [support@ahi-group.com](mailto:support@ahi-group.com) to get your videos started). Do you have an email address with your domain and the email signature we recommend in Section 12 (Resources Review) of your boot camp binder?
- 2) **Do you do “Flower Fridays” or some other type of volunteer activity like “music therapy”** to get into facilities that use home care agencies? Did you pre-qualify the facilities (shop them) to ensure they refer to home care? (see the Five Steps to Selling in your Boot Camp Binder to learn how to Pre-Qualify – also see the webinar link noted above).
- 3) **Have you created Preferred Partners** with Home Health, Hospice, ALF, SNF facilities? Do you actively market with their marketing reps each week? (see the Five Steps to Selling in your Boot Camp Binder to learn how to Pre-Qualify – also see the webinar link noted above).
- 4) **Do you hand out business cards to everyone** you come in contact with and tell them your 30 second elevator speech about the services your agency offers?
- 5) **Do you have the Presentations folders created and the “Lunch and Learn Presentation” printed** out and do you use them when doing presentations in front of people with lunches, etc.? ... to look professional. Do you have the “Benefits of Home Care Presentation” printed out and put in your sales binder so you can show your potential clients when you do your in home assessment?
- 6) **Do you document your weekly stop by sales calls with potential referral sources** on the “Weekly Sales and Marketing Report” on your USB drive in the “Marketing Programs” folder?
- 7) **Do you attend the weekly AHI Group Sales Calls and send in your Weekly Sales and Marketing Report** the day before the call – so your coach can discuss your week’s sales calls? Have you listened to all pre-recorded sales calls starting at #135 and going up to the current number (our support team can give you our current number)?
- 8) **Are you saying, “Do people you discharge ever have trouble paying for an aide to help them at home - to help prevent them from doing a re-admission within 30 days?”** .... why yes.... "Ok, well, I know of a government program that can help one in three seniors get up to \$2,200 a month that can be used to pay for aide care in their home. Do you think your patients would have interest in getting access to these funds?...." Yes! "Ok, well, I can come by and do a Lunch and Learn for you and your team to give you more information about this great government program. How about next Thursday at noon - I can bring in Subway sand-which for your staff?
- 9) **The key is what you are saying and how you are saying it.** Two people can walk into the same place and say the same thing and get a totally different result from the situation... because it is the way they present the information and how much people like them when they present it. Of course, the information is important too –but must be presented in a way that people will say, "...boy, I really like that person, she was so nice, sweet, caring, and seemed to have some interesting programs."
- 10) **Have you memorized your scripts from section 5 & 6 in your Boot Camp Binder?** You can't go on stage if you haven't memorized your lines. Role play, role play, role play and memorize, memorize, memorize!

**Elevator Speech:** "We help families figure out the right care solution and the funds to pay for it. We are aware of government programs that can pay for care services that most families are not aware of. We also specialize in helping Veterans and their spouses get funding to pay for their assisted living facility rent or homecare via a Veterans Administration program we are aware of."

# Top 10 Referral Sources

- Skilled Nursing Facilities
- Hospitals
- CCRC's (Continuing Care & Retirement Communities)
- Government: Medicaid [www.medicaidwaiver.org](http://www.medicaidwaiver.org)
- Government: Area Agency on Aging (AAA)  
<https://www.agingcare.com/local/area-agency-on-aging>
- Local Advertising: Radio/Magazines/Newspapers/**Car Wrap**  
(<http://www.calibersi.com/full-vehicle-wraps/>)
- Hospice and/or Home Health
- ALFs and Assisted Living Placement Specialists (outside sales team)
- Word of mouth from clients and people they know
- Internet: Google+ account, YELP, care.com, careinhomes.com, agingcare.com.