Driving Lead Conversions
Discovering Your Full Sales Potential
April 2014

KEY ACTIONS

☐ Review the handouts from the April Executive Workshop Webinar.

☐ Discuss the key steps to driving lead conversions.

☐ **Step 1** – Develop a nurturing strategy that keeps you top of mind.

Nurturing Strategy Checklist:

☐ Capturing of inquiry information includes the following:

- Online web forms that incentivize prospects to provide contact information.
  - Contact info should include name, phone, address/city, issue they are struggling with, what they are looking for in a home care provider, etc.
  - Incentives - Remember an incentive would be something they receive from you once they provide you contact information, such as an article on communicating with someone who has dementia, etc. Make sure you make it so they can download the incentive instantly after giving you their info.
- Solid inquiry intake process when they call in.
  - Make sure you have a service inquiry form that all team members have access to, ideally right from their desktop that they can fill out and then download into your contact database fairly easily.

*The Home Care Marketing Life Cyle concept originated from InfusionSoft, a leading CRM firm, Home Care Pulse has tailored it specifically for home care.

- [ ] Brainstorm different types of valuable content (articles, white papers, tools) that you can create as 1) online web form incentives and 2) as a nurturing drip campaign.
- [ ] Design and print a creative thank you card unique to your brand (e.g. "Flowers for you example in the webinar).
- [ ] Develop nurturing content designed to be a valuable resource to the family, for them to keep and utilize until they need the care.
- [ ] Is your content capable of demonstrating your expertise? For example, if you are the dementia care experts, make sure to create original content that demonstrates this expertise.
- [ ] Create a few different nurturing drip campaign schedules based upon what prospects are looking for. Example from the webinar below:

☐ **Step 2** – Adopt/re-evaluate your proven sales strategy.

Sales Strategy Checklist

- ☐ Research and adopt the right proven sales strategy. We recommend the SPIN Selling Strategy, as outlined in the presentation. (You can learn more about this selling strategy by buying the book SPIN Selling created by Huthwaite.) The rest of this checklist follows this sales strategy, but you're welcome to adopt a different one that fits your needs.
- ☐ Review the webinar handouts/presentation and/or the SPIN Selling book to ensure you have a firm understanding of the difference between Situation, Problem, Implication and Needs/Payoff questions.
- ☐ Create a sales training binder with the following labels/tabs:
  - SPIN Selling Overview
  - Situation Questions
  - Problem Questions
  - Implication Questions
  - Needs Payoff Questions
  - The Close
- ☐ Using the training provided in the webinar, create an overview of SPIN Selling and place it in the SPIN Selling Overview section of the binder. This exercise will also help you understand it better yourself. IMPORTANT – Make sure to include the tips from the webinar that we suggested for each.
- ☐ Develop Sample Questions for Situation, Problem, Implication and Needs/Payoff – Brainstorm and create 5-10 possible questions, for each of the four areas you would like your team members to ask about during inquiries. Examples provided in the webinar handouts.
- ☐ Place the different question examples in the binder under the applicable tab.
- ☐ The Close – Create closing scripts (example in the webinar of scheduling an assessment) and place them in the last section of the binder. Developing your own scripts will help you learn the system better and cater to your organization.
- ☐ Initial Sales Training – Schedule a 2-3 hour sales training with your team and go over the new sales strategy. Develop some role playing so they can practice it on one another.
- ☐ Ongoing Sales Training – Schedule a monthly sales training for those who take inquiry calls or perform assessments. Make sure to include the following components:
  - Discussion of previous month performance and open it up for feedback on what changes they would suggest you make to the sales process.
  - Recorded examples of good inquiries, if possible. Review with the team or individual.
  - Review SPIN Selling and always do role plays so they stay fresh.

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- [ ] **Step 3** – Re-evaluate and/or hire your sales position, which we call the Senior Care Consultant (SCC)

SCC Hiring Checklist (Even if you have a current SCC in place, some of these steps can apply to them as well, especially the Position Agreement).

- [ ] Create your SCC Position Agreement (The template for this agreement has been provided. If you do not have it, please contact us at vantage@homecarepulse.com).
- [ ] Using the Position Agreement, develop your job ad when you're ready to hire.
- [ ] Resumes should match the Position Agreement requirements as closely as possible.
- [ ] Personal interview with top 5-7 candidates.
- [ ] Assign homework – PowerPoint presentation outlining their sales activities for the first 90-days.
- [ ] Team interview – Schedule your top 2-3 candidates to sit down with your entire office staff for a team interview. Provide your team with questions they could ask the candidate but allow them to come up with their own. Those who conducted the personal interview and/or make the final hiring decision should not be present during this interview in order for the team to fully engage with the candidate. Then meet with your team afterward and get their opinion of each candidate.
- [ ] Pre-Employment Assessment – Identify and sign-up with a pre-employment assessment firm. We use Kolbe for office staff assessments and recommend Caregiver Quality Assurance (CQA) for caregivers. Kolbe's website is: www.kolbe.com. Have your top two candidates take the pre-employment assessment and evaluate their scores based upon your requirements found in the position agreement.
- [ ] Dinner Interview – Take your top candidate(s) to dinner along with their significant other, if applicable. We recommend you also take your significant other, if applicable, with you on the dinner. They can provide powerful insights you may not have picked up in the interview process.

If you would like to join us for future VANTAGE Executive Workshop Webinars, please sign-up for the VANTAGE Executive program if you haven't already done so. Details of this program can be found at www.HomeCarePulse.com and then clicking on VANTAGE at the top.