



# The Assisted Living Marketing Test

*Students in a new program at George Mason University in Virginia are learning what it takes to be good marketers.*

**I**N TODAY'S HIGHLY COMPETITIVE market, some assisted living facilities may be losing out because of poor marketing practices—especially the failure of marketers to capitalize on their initial contact with potential clients.

Students in the College of Nursing and Health Science at George Mason University (GMU) in Fairfax, Va., are given the opportunity to test this hypothesis each semester as part of a course called Assisted Living Management & Philosophy. The course is part of the nation's first college curriculum dedicated exclusively to assisted living administration.

Each semester, students enrolled in Assisted Living Management & Philosophy are given the same assignment: Posing as a potential client, telephone any assisted living community with a story about a loved one who needs care. Then report back to the class on how the facility's marketer responded to the call. In their role as "mystery shoppers," the students are instructed to indicate that they are prepared to spend \$25,000 to \$50,000 annually for the services.

While students in the most recent semester went into the assignment assuming that facilities would jump at the chance to land a high-end sale, many in the class were surprised and dismayed by the responses they received from marketing personnel.

"I was stunned," said one student, following her experience with a "rapid-fire" marketer. "The information just came flying at me. When I finally hung up the phone, I felt as though I

had been run over by a truck. I couldn't help but think that if this were someone calling an assisted living facility for the first time they would have been totally lost."

## Well-Schooled In Assisted Living

Of course, students enrolled in Assisted Living Management & Philosophy at GMU are far from clue-

■ **These scores are considered the minimum allowable for such a high-dollar purchase.**

less by the time they are called on to mystery shop. The course provides an overview of the evolution of the assisted living profession, as well as defined modules on licensing and regulations, operations and budgeting, resident care, risk management, dining, activities, and other hospitality services.

Two weeks of the course are dedicated to assisted living marketing. It is during this study that students are provided a "scenario" of an older family member and asked to complete the mystery-shop assignment. While students frequently customize their own scenarios, they are given the following facts as a starting point:

■ The family member in need of care is between 78 and 85 years old and appropriate for a basic level of care

services (assistance with cooking, cleaning, driving, socialization). She is otherwise physically fit and can dress and bathe herself and ambulate without a walker or wheelchair.

■ The family member is financially appropriate with an estimated \$150,000 in savings. She owns her own home at an additional value of \$200,000 to \$300,000.

■ The family member is ready to move into a facility within the next 30 to 40 days.

Armed with this clear lead, students then select a community utilizing the local Yellow Pages, the Internet, or a local seniors housing directory. Communities are graded on a scale of one to five in four individual categories: first-impression responsiveness, needs assessment, community's capability to meet needs, and follow-up/close. Each community also earned an overall score using the same five-point scale.

## How Communities Fared

Of the 18 communities shopped by students during the most recent academic year, only two received an overall rating of 5 (excellent), and only four received an overall rating of 4 (above average). These scores are considered the minimum allowable for such a high-dollar purchase. The remaining 12 communities, or 66 percent, received scores of 3 (average), 2 (below average), or 1 (poor).

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In assessing the reasons that so many of the communities scored poorly in the marketing exercise, students identified specific tendencies, including:

- *The push play* Marketers either failed to listen or simply ignored the specific needs of the resident identified. Instead, they simply “pushed the play button” in order to list every feature of the community.

“It was incredibly frustrating,” said one student. “[The marketer] started telling me all about their community after I had barely described my grandmother.”

- *We’re not ready* In these cases, the marketer was unavailable to help. “I called in the evening after I got off work because I thought that’s when some people might have time,” said another student involved in the exercise. “After seven rings the person who answered sounded annoyed and told me I had to call back and speak to the marketer during the day. But when I asked her if there was a good day to reach the marketer, she said, ‘Not today, not tomorrow, and not the next day. Just call next week.’”

- *Who are you?* These marketers failed to identify themselves by name or title. “All I knew was I was talking to someone named Suzy,” said the student. “I actually had to call back later to get her full name and title for my report.”

- *I forgot to close* This tendency was exhibited by marketers who provided lots of information but failed to follow through. “I kept waiting and waiting for the marketer to invite me for a tour of the facility,” reported the student. “But he had never even asked for my name, or even my phone number.”

- *The shotgun* A variation of the “push play,” this tendency was exhibited by marketers who pretended to be listening to specific needs, but then “pulled the trigger” on a memorized response once a key word or phrase had been presented. After one student offered that she had a concern regarding her grandmother leaving the stove

on, the marketer stated that “all of our apartments have fully functioning stoves.”

### Some Positive Signs

Of course, not all contacted communities failed to meet expectations. “The person answered after one ring, told

me her full name, and identified the community,” a student said. “Then she told me the full name and title of the marketer and put me right through. The marketer answered and repeated her name and title. She listened and answered all of my questions. She spent 15 minutes going over the vari-

ous needs of my grandmother and how they could be handled. She offered a tour and sent a brochure that I received the next day.”

But the best part of this community’s performance went beyond the call itself. “She told me early on that they had a waiting list and it might be as

long as 12 months before my grandmother could get in,” the student said. “But she said she wanted to go over any information I would need in case I would like to get on the list.”

When asked what conclusion could be drawn from this marketer’s performance, the answer came back in

near unison: “That’s why she has a waiting list!”

## Lessons Learned

Following the assignment, the class discussed their mystery-shop experiences. First, they were asked to raise their hands if they had described their experience to at least two or more individuals not associated with the class. Of the students who responded affirmatively, nearly all represented mystery shops that had provided the worst overall experiences.

**Lesson 1:** *Customers will repeat bad experiences at a much higher rate than good ones.* This repetition will continue in a “ripple effect” to additional potential customers, as well as reflecting negatively on the reputation of the community as a whole.

Next, the students were asked to imagine a point in the future in which an actual family member was in need of an assisted living community. How many of them would now choose to pursue a tour of the community they had contacted?

Predictably, those with positive experiences would and those with negative experiences would not. However, in either case the students were reminded that their decision was predicated on their telephone interaction with just one individual.

**Lesson 2:** *The performance of just one employee can affect the purchase decision of the consumer*

**Lesson 3:** *Assisted living marketing is not a function of being a born “salesperson.”* As with any profession, marketing must be studied, learned, and shaped by experience. The best marketers learn to listen more than they talk, never lose track of a lead, and correct their mistakes. ■

## For More Information

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