

Stand Out, Don't Blend In

Crafting a Winning Niche
in Crowded Markets

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CEO



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Learning Objectives

- 01 Community differentiators** Identify and reinforce community differentiators.
- 02 Define your niche** Use local evidence to choose a meaningful difference.
- 03 Deliver messaging** Connect your promise to specific examples in your marketing.
- 04 Deliver the promise** Make prospects and families feel heard at every touchpoint.
- 05 Commit to action** Choose one behavior, an owner, a due date and a measure.

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Generic Marketing Won't Win

Specific operational strengths

Generic claims such as "luxury amenities" and "excellent care" need specific proof.

Distinct business models

Differentiators range from customer experience, unique community features, dining options, care levels, to unique financial models.

Keep in mind that your local community is mostly interested in your community, not national brand.

Source: PS Living, Senior Living Trends 2025

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Differentiation Includes How Families Are Treated

A TRANSACTIONAL APPROACH

Leads with features, pricing and amenities
Talks more than it listens
Pushes for a close on our timeline

A PERSONAL APPROACH

Asks about their life and hopes
Listens for what matters to them
Guides the next step at a pace that feels safe

People feel SEEN and HEARD.

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FIND THEIR STORY

Connection Starts With Curiosity

Three moves that turn a routine tour into a moment that matters — each one starts with a question.

Find Their Story

"Tell me about your career and your family — what was the prime part of your life?"

Listen for Identity

"What are you most proud of?"
Listen for who they are: a veteran's wife, a nurse, a coach.

Find Common Ground

"Who would you love to meet here?" Match them to a resident, a group, or a moment already happening.

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MORE MOMENTS THAT MATTER

The Moment Starts Before They Arrive

Plan the Connections

Know them well enough to personalize.

- Reconnect them with someone they knew — church, work, the neighborhood
- Introduce residents with shared interests and life experiences
- Have the right team members ready to meet them
- Prepare apartments that fit their needs and preferences

Culture of Hospitality

When everyone knows their story.

- The whole community is ready before they walk in
- The tour becomes a personalized welcome, not a tour
- They feel recognized, valued, and like they already belong
- Preparation is itself a Moment That Matters

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TOUR BEST PRACTICES

Create an Experience Unique to Your Customer

Built from Discovery — they feel welcomed, seen, and heard.

Plan the whole visit Map the route and stops for personalization.	Personalized take-home A small, meaningful gift tied to their story.	Resident connections Introduce a resident with shared interests.
Engage the team Wellness, dining, and ED play a part.	Conversation highlights Weave back what they told you in Discovery.	Show you LISTENED & CARE Every detail proves you were paying attention.

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WHAT EVERYONE WANTS

“We want to feel that we made the right decision.”

Emotional connections support the “logic”

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CATALYST PROMPTS

Questions That Spark Tour Moments

- 1 “What kind of work did you do, and what did you love about it?”
- 2 “Tell me about your family — who’s closest to you these days?”
- 3 “What are you most proud of in your life?”
- 4 “What did a really good day look like for you?”
- 5 “What do you miss most — and what would you love to do again?”
- 6 “Who here would you most enjoy meeting?”

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PRIMROSE MOMENTS THAT MATTER

Real Tour Moments From Our Sales Team

The Veterans Coffee

Discovery made the moment possible.

- Touring a lady looking for independent living
- Discovery revealed her late husband was a veteran
- We passed the veterans coffee group in progress
- I introduced her — they embraced her and honored military wives

The Old Friend

An unplanned connection that changed everything.

- An open house tour of one of our few available apartments
- The resident there had worked with the prospect years earlier
- Hugs, catching up, dinner together, stories on the patio
- She saw belonging firsthand — and the two are friends again today

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MOMENTS OF DIFFERENTIATION THAT MATTER

The Music Was Already Playing

The Moment

A small detail, a big impact.

- Discovery uncovered the kind of music they loved
- Before they arrived, I changed the music playing throughout the community
- They walked into an environment that reflected something important to them
- They felt comfortable and connected immediately

Why It Works

They feel known, not just toured.

- Memorable tours are rarely grand gestures
- They're the thoughtful touches that prove we were listening
- Favorite music, a favorite food, a resident with shared interests
- Personal moments let them picture themselves living here

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SECTION 1

Define Your Niche

Who you serve, what matters to them, and how you prove it.

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Niche Marketing: Know Your Niche

What does your community do especially well?



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Strengths That Support Your Niche

Resident and customer experience, engagement

Floor plans, customization and finishes

Care levels, meals and dining

Staff tenure, location and ownership model

Mission, vision, values and signature programs



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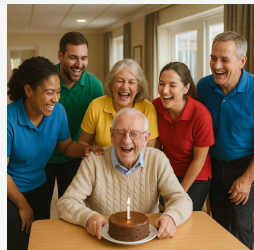
The Feeling of Your Community

Lifestyle and engagement promote wellbeing

Exceptional, gracious customer service

Older buildings can have strong differentiators

How does your community feel to a guest?



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SWOT and Competitive Analysis

Compare local needs with what your community delivers well

Include the sales director's skills when assessing the customer experience



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Sample SWOT: Strengths

Strong appearance, visibility and signage

Future-resident parking

Active residents and strong engagement

Revenue-focused Executive Director

Caring sales director who loves residents

Standout Engagement Director and program



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Case Discussion: Strengths and Low Occupancy

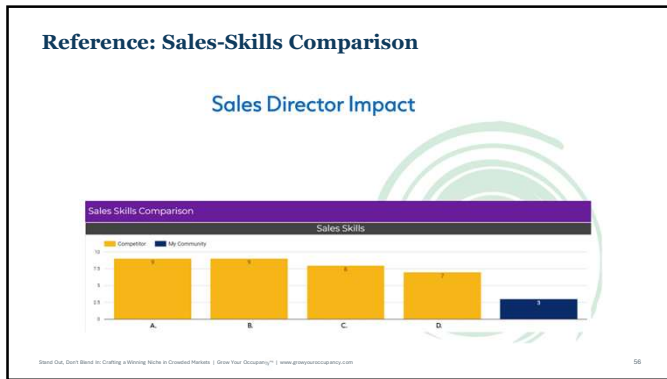
The biggest differentiator?



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Your Sales Director Sets You Apart

The sales director's skills are an often-overlooked community differentiator.

Assess how well they uncover needs, connect, personalize the experience and guide the next step.

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Your Niche in One Sentence

For [specific audience], our community offers [meaningful benefit], demonstrated by [observable proof].

TEST YOUR PROMISE

Does it matter locally?	Is it meaningfully different?
Can families see the evidence?	Can the team deliver it consistently?

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PAUSE & JOT 60 SECONDS

If your community's name disappeared, would your message still sound like you?

Think of one promise that could belong only to your community.

MY ONE-MINUTE TAKEAWAY

Write one specific promise and one example that proves it.

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SECTION 2

Positioning Examples

Look for a clear audience, a meaningful promise and supporting proof.

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Discovery: Multi-Brand Model

A regional approach to brand positioning

LOCAL BRANDS Morada TerraBella Discovery Management Group	LOCAL MARKETING Targets regional demographics and local consumer behavior Each brand feels local, with the backing of a national parent
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TAKEAWAY

Speak to your local market, not your corporate one

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Erickson: Financial Peace of Mind

THE MODEL

Amenity-dense CCRCs
Refundable entrance fee
Predictable monthly fees

THE MESSAGE

A pricing model explained clearly
Financial peace of mind as the message

TAKEAWAY

A complex price model, explained clearly, becomes a selling advantage

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Kisco and Sonida

KISCO

Premier tiers: Kisco Signature and Balfour
Curated wellness and fine dining
Marketing mirrors five-star resorts rather than healthcare

SONIDA

Enterprise-wide EHR platform supports proactive care
Technology provides proof of trust and transparency

TAKEAWAY

Connect the message to what residents and families value

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Communicating Your Niche



Use the same clear promise across local channels

Website: show who the community serves well – and HOW - storytelling

Social media: show real examples of the promise

Google Business Profile: keep local details current; videos, ratings (respond)

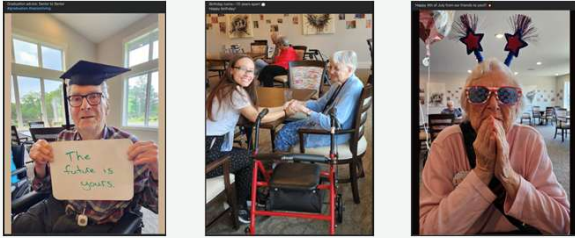
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Social Media: Tell a Story

Which resident interests and experiences does each story reveal?



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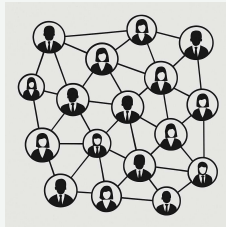
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Networking and Outreach

Which local partners serve the audience you want to reach?

Give them a clear reason to recommend you, backed by a specific experience or example. Focus on differentiators – your niche.



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PAUSE & JOT 60 SECONDS

What would a family learn about you before they ever walk through the door?

Choose one place: your website, a social post or your first reply.

MY ONE-MINUTE TAKEAWAY

Write the change you will make and the proof you will show.

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SECTION 3

Delivering Your Promise

How prospects and families experience your difference, from first contact onward.

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What Families May Be Carrying

Fear and uncertainty Concerns about change, safety or choosing the right place.	Overwhelm Moving, belongings, finances and care decisions can arrive together.
Grief and guilt Loss and family dynamics may shape the conversation.	Practical barriers Timing, finances or disagreement may also explain hesitation.

Ask what feels uncertain. Leave room for the next step to be “wait.”

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Questions That Help People Feel Heard

Understand the moment	<i>“What’s happening that made today the day you called?”</i>
Explore the impact	<i>“How has that changed things for you and your family?”</i>
Recognize the person	<i>“Tell me about you, your family, your children, your career?”</i>
Understand uncertainty	<i>“What problem would living at our community solve for you/family?”</i>

Pause. Reflect what you heard. Let their story guide the conversation.

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A Small Detail That Showed We Listened

THE MUSIC WAS ALREADY PLAYING

Discovery revealed the music they loved.

Before the visit, the team changed the music playing in the community.

A PERSONAL WELCOME

Their welcome reflected something important to them.

A thoughtful detail showed we listened.

Differentiation can be a thoughtful response to what someone shares.

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PAUSE & JOT 60 SECONDS

What would a recent family say about how you made them feel?

Recall one conversation or visit. What showed that you were listening?

MY ONE-MINUTE TAKEAWAY

Write one question you will ask in your next family conversation.

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Team Collaboration

Every department contributes to the promise

Share what matters to each prospect and family

Assign the welcome and introductions at stand-up

Ask guests what made them feel heard


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The Executive Director's Role

Meet guests and reinforce the community's promise

Support the agreed next step after the visit

Ask the team what mattered to each family

Resolve gaps between the promise and the experience



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The Pre-Tour Impression



A personal message tied to their interests

Confirmation with the plan and who will greet them

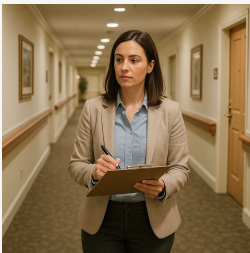
Reminders through their preferred channel

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A First-Impression Audit



Walk through as a first-time guest. Notice the sights, smells and sounds.

Watch the welcome and human interactions. What supports your promise? What contradicts it?

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WM1 SalesMail screenshot – pre-tour
WES MELTZER, 2024-05-13T14:10:06.120

VM1

The First Tour

What makes a guest feel expected before the tour begins?



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A Welcoming Visit

"We are glad you decided to visit."

Engage residents and associates

Keep the experience customer-focused

Help the customer leave with clarity



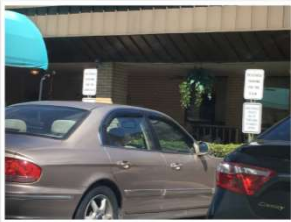
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First Impressions Matter

What would these details communicate to a first-time visitor?

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WM1 Dan – post-tour photos from email
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Details Matter

Which small detail would you improve first, and why?



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TOUR BEST PRACTICES

Create an Experience Unique to Your Customer

Built from Discovery: they feel welcomed, seen, and heard.

Plan the whole visit	Personalized take-home	Resident connections
Plan stops around their interests.	A small, meaningful gift tied to their story.	Introduce a resident with shared interests.
Engage the team	Conversation highlights	Show you listened
Wellness, dining, and ED play a part.	Weave back what they told you in Discovery.	Make the welcome personal.

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Tour Moments That Matter

A ready model	Stage the apartment with lights on, soft music and fresh flowers.
A resident's story	Invite a resident ambassador to share their experience.
A clear next step	Agree on a meal, event or second visit if helpful.
Personal follow-up	Send a personal thank-you within 24 hours, using their preferred channel.
A team-wide experience	Every person the guest passes is part of the tour.

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PAUSE & JOT 60 SECONDS

Which moment in the visit would a family remember most?

Picture the arrival, conversation, introductions and goodbye.

MY ONE-MINUTE TAKEAWAY

Write one tour moment to improve and who can help.

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Helpful Follow-Up at Their Pace



- Agree on the next step, timing and contact preference
- Send a personal thank-you within 24 hours
- Reconnect at the agreed time with something useful
- Respect a decision to wait or stop contact

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Move-In Day and the First Month

- Prepare a welcome sign and welcome basket
- Plan the first meal: when, where, what and with whom
- Decide who greets the resident at the front door
- Assign a check-in owner for the first week and month



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Residents are most likely to refer within the initial 90 days of residency

when they are **HIGHLY** satisfied

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The Promise Continues After Move-In



Ask whether the experience matches
what we promised

Resolve concerns and follow through
visibly

Earn the stories residents choose to
share

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Stand Out, Don't Blend In: The Recap

- A clear niche** Know whom you serve especially well and what matters to them.
- Credible proof** Show the experiences that make your promise believable.
- A human experience** Listen to prospects and families. Respect their choices and pace.
- Consistent delivery** Give the whole team a role, from first contact through move-in.

Your difference is the promise you make and the experience you deliver.

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Your Next 30 Days: One-Minute Commitment

Take 60 seconds. Choose one takeaway.

Connect it to your audience and promise.

My first action: _____

Owner and date: _____

My measure of progress: _____



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Stand Out, Don't Blend In: My Takeaways

PARTICIPANT TAKEAWAY & ACTION PLAN 1 OF 3

Name: _____ Community: _____

1. Our difference

For (audience): _____

We offer (benefit): _____

Our proof: _____

2. The proof families will see

One change to our website, social post or first reply:

The proof I will show: _____

3. How we will listen

One question for my next family conversation:

4. The experience we will improve

One tour moment to improve:

Who can help: _____

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My Next 30 Days: One Priority

PARTICIPANT TAKEAWAY & ACTION PLAN 2 OF 3

Choose one idea from your takeaways. Turn it into a specific first step.

MY COMMITMENT

The behavior I will change:

My first action: _____

Owner: _____ Due date: _____

My measure of progress: _____

Starting point: _____ Target: _____

MY FOLLOW-THROUGH

What could get in the way?

How will I respond? _____

Check-in partner and date: _____

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My Follow-Up: What Changed?

PARTICIPANT TAKEAWAY & ACTION PLAN 3 OF 3

Keep this page with your action plan. Schedule both check-ins before you leave.

MY SEVEN-DAY CHECK-IN Date: _____ What did I try, and what happened? _____ _____ What will I adjust next? _____ _____	MY 30-DAY REVIEW Date: _____ What changed? What evidence shows progress? _____ _____ What is my next step? _____ _____
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Your difference is the promise you make and the experience you deliver.

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Q&A: Your Questions and Next Steps

What would you like to clarify?

Where might you get stuck?

What support would help?

What will you do first?

thank you!

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