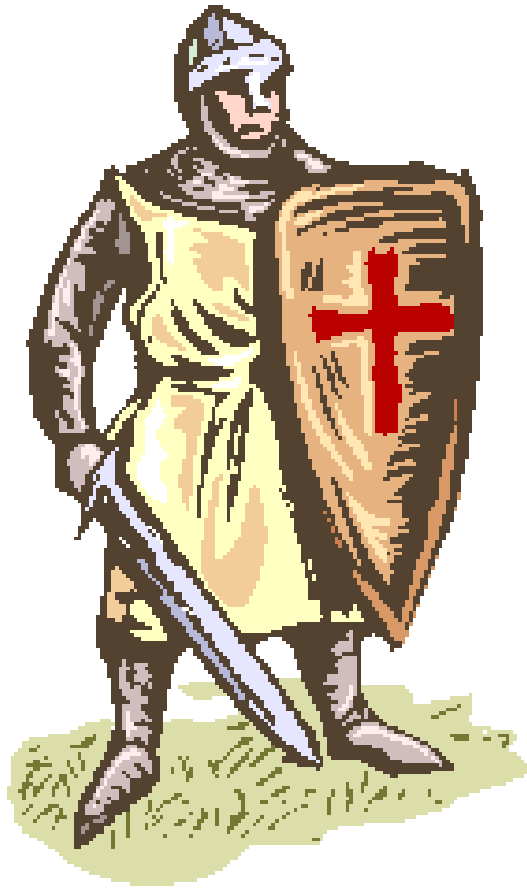


The Crusader Playbook



fast forward>>>>
Fast Track. Forward Thinking. Focused On Results.

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Your Media Mix

1. Harvard and McKinsey say that two thirds of the economy is influenced by word of mouth. One word of mouth is equal to 600 advertising exposures. Consider this. The auto industry has increased its mass media spending by 1,378 percent over the last 20 years. Yet sales went up just 17 percent during that time and by the way those advertising costs added \$4,000 to the price of your car! Here's more. McKinsey says that in six years traditional advertising will be one third as effective as it was in 1990. And the market is so saturated with messages that there has been a 37 percent decrease in the effectiveness of advertising.
2. Makes you want to analyze your media mix perhaps.
3. Let's see how we compare to one another. Take a look at the media mix below and assign percentages (totaling 100 percent) for how you spend your budget.

Television advertising _____

Print advertising _____

Radio advertising _____

Billboards _____

Direct Mail _____

Web/Interactive _____

Leveraging Crusaders _____

The Value Chain

1. Not every customer/patient/resident experience is valued the same. Let's look at starting to assign a value to the experience you offer. Score each of the items below. If an attribute is a positive value differentiator, give it a score of one to three, three meaning it has the highest value in differentiating you and increasing value. Likewise if the attribute is negative, score it from a minus one to a minus three. Then add them up.

2. Overall quality ratings from CMS, other entities _____

Satisfaction ratings _____

Preference data ranking _____

Awareness ranking _____

Magnet status _____

Desired place to work _____

JCAHO Accreditation _____

Other industry standard awards _____

What alternatives do people have? _____

How easy is it to compare your organization to competitors? _____

Price Positioning _____

3. What other attributes would you add? _____

4. What is your score? _____

Data Collection

1. Various data collection methods will be described throughout the session. Many of these require face to face information gathering. The following are some tips for gathering information face to face, what to ask, how to listen, how to pick up on what is not said, how to read emotions.
2. When engaging residents in conversation, first imagine that person is your aunt, mother, grandmother.
 - a. Greet them enthusiastically.
 - b. Greet others in the room.
 - c. Ask if they need anything explained.
 - d. Empathize.
 - e. Remember your conversations with residents day to day. In this way you can begin to store a mental database of their interests, concerns, their life and you can reference back to that.
3. When talking to anyone, listen and observe.
 - f. What do people love about the facility? Specifically. Not just that the people are nice. What person? Why specifically? What do they do? What do they say? The key to knowing what people love about you is probing. The more detail, the more information you have to play up your strengths and define your unique selling proposition.
 - g. Obviously the same applies for what they do not like about you. The key here is to find out and then have an answer for the person about what you will do to fix it and when.
 - h. Observe the emotion. If someone dislikes something and says it passively, it is certainly different than if they are jumping up and down about it (sort of like Tom Cruise on Oprah's couch!). Emotion, eye contact, hand gestures – these all say something about what the person is feeling and reacting.
 - i. What do people value in what you offer?
 - j. Where do you need to improve?
 - k. What has angered them?

- l.** Do they recommend you? In what forum? To whom? What specifically is said?

- m.** Capture testimonials. If you like what I present today, I have asked you to fill out an evaluation and I specifically ask for comments that I can reproduce with permission on my web site. My business is no different than yours. I thrive on referrals and referrals come from word of mouth. Also keep in mind that people will open up more readily to third parties collecting the information. If I go to my car dealer for service and they call me afterward, I may be polite. If the corporate office calls, I may open up a little more. If a third party calls, I will let them know what I really feel!

Data Collection Tactics

1. Inventory all of your feedback loops. How robust are they? How quickly can you gather and act on information? Incorporate hard data in your feedback loops. For example, in long-term care, residents have been socially conditioned to not say anything to your face but will complain privately. They do however, “act with their feet.” If they say they like two activity people equally, the proof may be whose activities do they show up for the most. Be on the lookout for that type of data.
2. On the web, instead of just having a short form to request information, collect detailed information. Are they the caregiver or the one in need of care? Collect basic health data observing HIPAA regulations. Collect information about their interests and activities. Do they have children, grandchildren? Have them opt into a newsletter. Provide an incentive for them to give you the detailed information. Surveys, test marketing, pop up surveys – all help you to interact with the prospect and collect information.
3. Post portraits and emails of the executive staff on the web. It sends a strong message when someone knows they can communicate directly to the top of the organization.
4. Observe people interacting with the brand. Often what people believe or think contradicts what they say when asked directly. Some of this happens when research is done in a focus group environment and there are group pressures at work. So at the very least consider in-depth interviews as a data collection method of choice. But then embrace the observation piece. Brave companies are arming consumers with hidden cameras and recording their interaction with the brand. Mystery shoppers are employed by retailers and even hospitals employ shoppers who actually check in for some basic testing.
5. If someone transfers out of your facility to another or to home, conduct an extensive exit interview as you would (or should) if a staff member leaves.
6. Likewise if someone is coming into your facility from another, spend extra time finding out why. These become competitive differentiators for you.
7. Conduct executive director listening sessions in the community. Invite a select group of influencers to lunch or dinner and give them an update on what is taking place in your facility.
8. Conduct in-depth interviews with families and caregivers after a loved one has passed in your facility. Of course give ample time for grieving before doing so but when you do, probe for details of what they valued in the facility as well as what could have been done better. See how engaged they are to

continue a relationship with the facility. One dear friend of mine continued to volunteer at a nursing home for five years after his wife passed on there. Who are these caregivers? What are their positions in the community? How important is it to keep them abreast of facility news and developments?

9. Proactively interview your facility's ombudsman. There are facilities that distance themselves from ombudsman and others that embrace what they do and are thankful. If I am an ombudsman, who would I be buzzing about positively?
10. Have regular brainstorming sessions with employees. They are the front line PR ambassadors for your facility and they know what is going on and what people want. Listen to their ideas and pick and support the best ones. This in turn contributes to employee satisfaction and staff retention.
11. Use the change of shift strategically. Don't just compare clinical notes but experiences as well.
12. Careful observation can lead to on the spot customer service. One of my activity directors in New Jersey was doing a program for residents about cars and asked them to name their favorites. One resident, Jean, mentioned a Mustang because her son had one. She had never driven in one. So the next day, the activity director brought in her Mustang and drove Jean around the parking lot. Jean was delighted. Think of what she said to her sons. Think of what they said to others. It's not just the doing; it's doing quickly in order to bring customer delight.
13. Collect information on visitors. Engage them as they come in. Many businesses – hospitals, car dealers, etc. – have adapted their environments to make it conducive for visitors to want to come and stay. For example, business centers are cropping up in these places, cubicles, wireless connections, copiers, faxes. Think of how more likely a caregiver may be to spend time with a loved one knowing they could also get some work done in the process.
14. Know the resident's story before they step in the door. Assign a concierge to that person.
15. Take a few minutes now to list other ways to collect data to help sharpen and define customer experiences. Remember the more you collect, the better you can define the experience and when you offer a great experience, people talk about it. That is the strongest marketing you could possibly have.
- 16.

17.

18.

19.

20.

21.

Use more space as needed.

BONUS: Look in the back for The Mackay 66 Customer Profile. See how an envelope company collects data about interests and influence of potential and existing customers and uses that later to market and create experiences.

What To Do With The Data

1. Share feedback throughout the organization and solicit comments for how to leverage the information.
2. Perform immediate fixes.
3. Think innovatively about the fixes. For example, one hospital has a policy if they draw blood incorrectly to go to the patient's house and do it again, leaving behind a gift certificate for the inconvenience.

What are your routine complaint procedures? How can you enhance them and make them memorable?

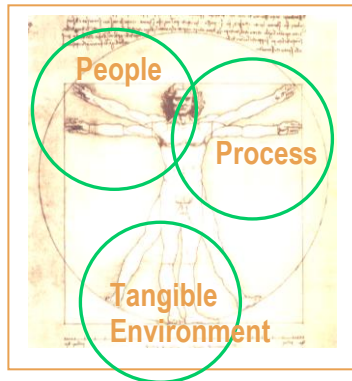
4. Track trends from the information for future service enhancements.
5. Publicize your successes. It does not have to be over the top or expensive. For example, every time I go to my grocery store Harris Teeter and present my VIC card, as the cashier hands me my receipt, he/she tells me how much I saved and the coupon reflects that as well. American Airlines announces their on time arrivals by saying, "Welcome to Philadelphia and our on time arrival." Westin Hotels have the Heavenly Bed. You can actually buy one for your own home. Their do not disturb sign reads – "I can not come to the door now. I'm in heaven."

Think about signs you can post, announcements you can make that are discrete, subtle but get the point across that you are listening and improving all of the time.

6. Analyze the data you receive from a market segmentation standpoint and a messaging standpoint. If you collect detailed information, you are going to know the interests and demographics of potential audiences. That changes how you market to them.
7. Analyze and start identifying crusaders and antagonists and begin formulating plans for engagement.
8. Create a database of crusader information.
9. Check out www.buzzlogic.com for more on the science of identifying true influencers.
10. What else would you do with the data? List them on the other side of this sheet.



Experience Awareness Tool



The first step towards managing experiences is to understand what makes up an experience. This *Experience Awareness Tool* is designed to help you understand the anatomy of experiences. Experiences are composed of everything that's happening moment-to-moment – both tangible and intangible. This includes what we see, hear, smell, touch or taste; and that information comes from a combination of:

- People (what people do and say),
- Processes (how things work and how information is exchanged), and the
- Tangible sensory environment (colors, shapes, objects, sounds, signage etc.).

When we are aware, every experience becomes an opportunity to engage with the world differently. Without awareness we wind up doing things mechanically, habitually, repetitively and automatically. Sound familiar?

"The tangible attributes of a product or service have far less influence on consumers' preference than the subconscious sensory elements derived from the total experience."

--Dr. Gerald Zaltman

Co-Author: *How Customers Think*



Neuroscience: The Science behind the Tool

Neuroscience tells us that every second we take in 20 million bits of data through our five senses from everything that surrounds us. 98% of that data is processed unconsciously and our first reaction is always emotional. Emotions always play a key role in our experience. Our rational response doesn't kick in until six seconds after our emotional response.

"Today more so than ever before, customers listen with their eyes to see what a company does rather than with their ears to hear what the company says. Customers feel first, think second - and interactions with a company strongly influence their heart and produce a longer lasting impact than communications directed toward their heads. For example, after a negative experience with a company, 47 percent of consumers admit to swearing or shouting, and 29 percent have gotten a headache, felt their chest tighten, and/or cried."

Cultivating Awareness – Pay Attention

Awareness is a lot like a phrase we may have heard from parents or teachers when we were younger, awareness is about "paying attention."

Awareness means selectively directing your attention to specific aspects of what's happening around you and being conscious of events, objects or patterns picked up by your senses and the impact those aspects have on how you are feeling.

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Outcomes of Awareness

This Tool will increase your awareness of what you are experiencing in a given moment through your senses and feelings. As a result:

- You will never view your experiences the same way again, as you are aware of more of those 20 million bits of data and their impact.
- You will understand why feelings are key as a guide, and as an outcome, of experiences.
- You will gain insight about the interrelationship between all aspects of an experience.
- You will understand these tools work because:

**New perspectives create new beliefs
and the opportunity for new behaviors.**

You're Invited to Explore your Experiences in New Ways






"The brain waits for the body to tell it what transpired."

--Dr. Tony Damasio

Author: *The Feeling of What Happens: Body and Emotion in the Making of Consciousness*

Step 1: Become more aware of the experiences you are having.

- **H**ave fun. This is much like an adventure game or scavenger hunt. As you use this tool, notice how many aspects of your experiences you are more aware of each time you pause and pay attention.
- **E**xplore the landscape. A few times a day take a moment to explore the experience, this includes:
 - **People:** Consider what people are saying and doing.
 - **Processes:** Observe the processes you are engaged in to exchange information.
 - **Tangible Sensory Environment:** Identify what you are picking up from the space itself.
- **T**une in. Identify how you are feeling in this experience.
- **M**ap your journey. Track your insights using the chart below, or just make mental notes. You may find the chart helps to increase your awareness of the many aspects of your experiences.
- **What experience are you having? What are you doing?**

	People <i>Tip:</i> pay attention to language and hand gestures.	Processes <i>Tip:</i> identify steps, procedures or checklists involved.	Tangible Environment <i>Tip:</i> isolate one sense at a time.	How do you feel? <i>Tip:</i> identify how you are feeling using three feeling words.
				
				
				
				
				

Step 2: Reflect on what you have learned.

- What did you notice about your experiences that you were not aware of before?
- Were your feelings that resulted from each sense and the people, processes and the tangible sensory environment aspects of the experience consistent?
- Did any of your beliefs or attitudes about the experience change?

Try it out for a few weeks.

Share with others and discuss your observations.

The icon for this tool symbolizes connecting the head and the heart. With this Experience Awareness Tool you develop a new lens for how you experience the world - with your head and your feelings.



Experience Audit

1. Before you can begin an experience audit, you must understand who comprises your audience. List them here. Examples include residents, families, referrers, vendors, regulators, prospects.

a. _____

b. _____

c. _____

d. _____

e. _____

f. _____

g. _____

h. _____

i. _____

2. Inventory all the touch points you have with your audiences.
3. Conduct in-depth interviews with selected audiences.
Find their touch points.
What do they seek?
Ask them to describe what it is like to be a (vendor, resident, caregiver, etc) to someone who is not familiar with your facility.
Ask them to define their ideal experience.
When were their expectations exceeded and how?
How can the experience be improved?
4. Compare your inventory to their interview.
Does the map of touch points you constructed match theirs?
What needs to change?
What are their needs and expectations at each stage in the process?
What do they need to know and why at each stage?
What resources did they seek?
How well did those resources meet their needs?

5. Move beyond taking inventory to envisioning what a great experience looks like. Understand your customer's vision. How do they want to use your services? At all times, try to simplify, improve, surprise, entertain and give choices.

Monitor the Environment

1. There are a variety of places where the public can find out information about a facility. More crop up everyday. Here is a starter list.
2. <http://www.medicare.gov/Nhcompare/home.asp>
The federal government provides resources to help you find and compare nursing homes. The media uses these all of the time. Do you know what is posted? Are you prepared to address each deficiency to a comparing public?
3. www.LTCfocUS.org
A new web site for analyzing and choosing nursing homes has been developed by the Center for Gerontology and Healthcare Research at Brown University. Because it is academically based it seeks to provide evidence based data that is unencumbered by the politics and the inaccuracies of other nursing home comparison sites and data.
4. www.technorati.com
This is one of two main sites for bloggers. What are they saying about your facility? About the industry in general?
5. www.blogpulse.com
This is the second most popular blog site.
6. www.backtype.com
Backtype allows you to track blogs and blog comments to further narrow whom is talking about issues on certain topics.
7. www.google.com
Go to google and create alerts for your facility. In this way if you are mentioned somewhere on line you will be notified.
8. <http://www.aarp.org/>
AARP needs no explanation.
9. <http://www.aoa.gov/>
The web site of the Administration on Aging of the Department of Health and Human Services is designed to provide a comprehensive overview of a wide variety of topics, programs and services related to aging.
10. <http://206.112.84.147/index.cfm?bType=ie4>
The National Council on the Aging offers resources, articles and a feature called BenefitsCheckUp.

11. <http://www.eldercare.gov/>
Part of the Administration on Aging, this site features an Eldercare Locator that helps older adults and their caregivers find local services for seniors.
12. <http://www.elderweb.com>
ElderWeb includes thousands of reviewed links to long-term care information, a searchable database of organizations, and an expanding library of articles and reports, news, and events.
13. <http://www.tlchoices.com/>
Total Living Choices features a tool, Care Interpreter™ that asks questions about the person you are seeking care for - finances, health status, memory impairment, independence, special considerations - then creates a grid that outlines care living options and related information to help you learn more. How do you stack up here?
14. <http://www.seniorsite.com/about/index.asp>
SeniorSite.com provides a special, easy-to-navigate site where older adults and their families can find personalized information and services.
15. www.facebook.com
I recently had an older physician tell me he received a referral from Facebook. He laughed because he had no idea what Facebook was about. Turned out a potential patient asked their network of friends to recommend an orthopedic surgeon and he garnered the most votes and a new patient!
16. www.twitter.com
People are reporting events in 140 characters or less. Think it does not affect you. I'll give you an example. I was made to sit in my ophthalmologist's office for 45 minutes waiting for the physician to come in. I was bored so what did I do. I told my network of 700 followers about my bad experience. Want a lesson on how to use Twitter? Research what Comcast does in this arena.
17. Use the following spaces to list other places where people can get information about you and which you should be monitoring. We'll get you started.
18. Reporter who covers aging issues in your community: _____
19. Your ombudsman: _____
20. Legislators: _____
21. From your data collection, which one of your audiences has a blog, a web site, an ezine, a popular site on myspace or youtube – anywhere that they

have an audience that is willing to listen to them.

22.

23.

24.

25.

26.

27.

28.

29.

Give Something Away

1. In retail they talk about loss leaders, giving something for a reduced cost or free just so people will take a look and see what you have to offer. The same concept applies to service industries as well. Remember that healthcare and especially long term care is something no one wants and it may be years before they need it. But when they need it, they have years of information, thoughts, emotions, gut feelings about where to go. What you are building by giving something away are “tipping points” for people to choose you. Let’s say you and a competitor offer essentially the same services at the same price. Quality and satisfaction ratings are equal. How do people choose? Of course word of mouth is one. But they also reflect back on any experiences they may have had directly with your facility. If it was a positive experience then you have created a tipping point and an advantage for that person to consider you over your competitor. Here are some ideas. Add your own afterwards.
2. Offer an in-home assessment to make the home senior friendly. Local vendors might participate and benefit. This introduces you to community members and caregivers who might need your services down the line.
3. Brand extensions such as offering home health provide additional ways to find out who your targeted audience is as well as to create tipping points by providing exceptional service. This is a sales funnel to your facility.
4. Think creatively. Bring your most popular activity into the home or the community. Educate people about what they can expect should they need care in a long term care facility.
5. Provide geriatric assessments.
6. Start an affinity program, a membership program for seniors or caregivers. Offer local vendor discounts. Publish a newsletter with tips for caregivers. Give this audience sneak previews of what is coming to your facility. Use as a vehicle to involve them with facility.
7. Publish a brochure on how to choose a facility. You can easily emulate others that are out there. The important thing is that it is you that is giving out the information not your competitor. By keeping it objective and not a sales document, you create goodwill.
- 8.
- 9.

Create Community

1. When Shouldice Hospital brings former patients together, when Harley brings road rally participants together, when Saturn used to bring owners together (poor Saturn!) at picnics – people congregate and communicate. And they are talking about the very thing that brought them together. They then go home and talk to others about it. Like the commercial said, “and they told two friends, and they told two friends, etc.” Find a reason to bring communities of people together.
2. Link families of residents who have similar interests or problems.
3. Link caregivers to former residents’ families for support.
4. Pair and introduce residents with similar interests.
5. Have a reunion dinner for caregivers.
6. Have a reunion dinner for those who rehabbed in your facility and then were successfully discharged to home. That sends a powerful message that long term care facilities are not just one way trips.
7. Start resident blogs.
8. Host online discussion forums on topics of interest to residents and families.
9. Use emerging technologies such as IM panels to bring groups together.
10. Sponsor list serves that you monitor but which allow communities to talk about specific issues and problems.
11. Create communities through the causes you adopt, sponsor or take a lead.
12. Use the rest of the page to list other ways to bring communities of people together.
- 13.
- 14.
- 15.

Develop Services that Naturally Extend Your Brand

1. Michelin was just a rubber company back when the automobile was first invented. They invented the Michelin Guide as a way to spur interest in people wanting to travel. In turn, travel was linked to a mode of transportation – the car. As people became more interested in travel, car sales increased. Oh and yes, you do need rubber for those tires. They are now synonymous with tires. Similarly, when commuter trains were first introduced, they were busy just during the week days. The train industry was looking for a way to fill the dead time. So they spurred the building of amusement parks at the end of the train lines. Guess what? Ridership increased. These companies developed something that naturally extended their brand and was compatible with how their intended audience lived their lives. You can do the same.
2. In many ways, it is really the caregiver that you are trying to impress. Here is an idea. The one thing caregivers need is more time. And the more time they can spend with their loved one, the better for both. So offer an errand service so that while they are visiting, someone else can: go get their car washed, get the oil changed, drop off dry cleaning, pick up a prescription, run to the grocery store and so on. Caregivers would pay a nominal fee plus the direct cost of the goods you procure. Extend that service to your staff at no charge and watch morale increase.
3. Consider any type of service that helps the caregiver organize their time better.
4. Offering home health services is a brand extension and a way to identify future potential users of your service.
5. Selling DME is a brand extension to what you do as well.
6. Sit down and brainstorm ideas with staff and when you conduct in-depth interviews for your experience audit make sure you probe for the types of services you can offer that extend your brand, build tipping points and that may even generate some additional revenue for the facility.
- 7.
- 8.
- 9.
- 10.

Make Their Priority Your Priority

Following is a matrix with some events that take place in the life of boomers and GenX'rs. The key is to figure out a way to intersect their priorities. What other triggering life events are there? How can you intersect their current priorities?

Triggering Life Event	Young GenX (Under age 35)	Leading GenX and Trailing Boomers (35-44)	Leading Edge Boomers (45-54)
HOUSEHOLD FORMATION EVENTS			
(First) Marriage			
Birth of child			
Single parent			
Divorce			
Death of spouse			
Remarriage			
Alternative life style			
Children go to college			
Last child leaves home			
Child marries			
Birth of grandchild		Average age when first grandchild = 47	Average age when first grandchild = 47

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Triggering Life Event	Young GenX (Under age 35)	Leading GenX and Trailing Boomers (35-44)	Leading Edge Boomers (45-54)
Adult child divorces or child's spouse dies			
Remarriage of adult children			
Purchase of home			
INHERITANCE EVENTS			
Leaving a legacy			
Receiving an inheritance			
CAREER EVENTS			
New employer/new career			
Relocation for new job			
Start-up business			
Losing job			
Failure of business			

Triggering Life Event	Young GenX (Under age 35)	Leading GenX and Trailing Boomers (35-44)	Leading Edge Boomers (45-54)
RETIREMENT EVENTS			
Leaving employer			
Selling business			
Sale of home			
Relocation			
HEALTH AND DEPENDENCY EVENTS			
Disability or chronic illness			
Disability or chronic illness of spouse			
Disability or chronic illness of parent/grandparent			
Disability or chronic illness of child			
Death of parent/grandparent			
Relocation to assisted care Facility of parent/grandparent			

Customer Delight

1. You create customer delight when you do something totally out of context. Here are some ideas.
2. Let's say you have a new resident and their associated caregiver. It is a new experience for both of them. There is stress and worry and time demands. Why not offer some gestures to show you know what they are going through? The incremental expense is well worth it.
3. Provide free lawn mowing for the caregiver for a month.
4. Provide an allowance for having their house cleaned for a month by a person/service of their choosing.
5. Send flowers to the caregiver and the resident the first week after admission as a way to cheer them up.
6. Send the caregiver for a massage, manicure, etc. We know that the majority of caregivers are women but some are men. While a man might enjoy a massage, there are certainly other things you can think about offering.
7. Let's say the information you collect about someone before they become a resident shows that they are an avid dog lover. (Many seniors replace the loneliness of losing a spouse by buying a pet!) Perhaps decorate their room with some accent material that brings happy memories of their pet. A book on that type of pet. Pillows and other accent items with dog images. If there is a house dog, make sure that it is part of the welcoming committee for this person.
8. Pair a nurse or CNA together with a resident with similar interests based on the information you have available.
9. Get the staff involved and brainstorm other ways to create customer delight. What can you think of right now? List them here.
- 10.
- 11.
- 12.
- 13.

14.

15.

16.

17.

Use more space as needed.

Types of Word of Mouth Marketing

- **Buzz Marketing:** Using high-profile entertainment or news to get people to talk about your brand.
- **Viral Marketing:** Creating entertaining or informative messages that are designed to be passed along in an exponential fashion, often electronically or by email.
- **Community Marketing:** Forming or supporting niche communities that are likely to share interests about the brand (such as user groups, fan clubs, and discussion forums); providing tools, content, and information to support those communities.
- **Grassroots Marketing:** Organizing and motivating volunteers to engage in personal or local outreach.
- **Evangelist Marketing:** Cultivating evangelists, advocates, or volunteers who are encouraged to take a leadership role in actively spreading the word on your behalf.
- **Product Seeding:** Placing the right product into the right hands at the right time, providing information or samples to influential individuals.
- **Influencer Marketing:** Identifying key communities and opinion leaders who are likely to talk about products and have the ability to influence the opinions of others.
- **Cause Marketing:** Supporting social causes to earn respect and support from people who feel strongly about the cause.
- **Conversation Creation:** Interesting or fun advertising, emails, catch phrases, entertainment, or promotions designed to start word of mouth activity.
- **Brand Blogging:** Creating blogs and participating in the blogosphere, in the spirit of open, transparent communications; sharing information of value that the blog community may talk about.
- **Referral Programs:** Creating tools that enable satisfied customers to refer their friends.

Courtesy of the Word of Mouth Marketing Association

Articles of Interest

The Importance of Continuous Customer Feedback (link - <http://www.4wardfast.com/Documents/Cirillo%20Article-Sept%202005.pdf>)

The New CEO – Chief Experience Officer (link - http://www.healthleadersmedia.com/print.cfm?content_id=88259&parent=105)

More at <http://www.4wardfast.com/press-room>

Other Marketing Resources

www.iabc.com

www.prsa.org

www.marketingprofs.com

www.marketingpower.com

www.healthleadersmedia.com

www.womma.com

www.chiefmarketer.com

www.peppersandrogers.com

www.reachcc.com

The Mackay 66

Customer Profile

It's critical to have information about your customer. Armed with the right knowledge, you can outsell, out-manage, out-motivate and out-negotiate your competition. Knowing your customer means knowing what your customer really wants. Maybe it's your product, but maybe there is something else, too: recognition, respect, reliability, service, friendship, help - things all of us care more about as human beings than we care about long term care issues.

Once you attach your personality to the proposition, people start reacting to the personality, and stop reacting to the proposition. Use this questionnaire to develop a profile of each customer. Some of your resources for the information might include receptionists, suppliers, newspapers, assistants, trade publications, and the customers themselves. Look, listen, and learn all you can about the customer, both personally and professionally. You'll find topics for opening conversations, which can open doors for you and your company.

Customer

1. Name

Nickname

2. Company name

3. Address

Home address

4. Telephone:

Business: _____

Home: _____

5. Birth date: _____

Place _____

Hometown _____

6. Height (approx.) _____
Weight (approx.) _____

Education

7. High school _____

Year graduated _____

8. College _____

Year graduated _____

College honors _____

Degrees _____

9. College fraternity/sorority _____

Sports _____

10. College extracurricular activities _____

11. If customer didn't attend college, is he/she sensitive about it? _____

12. Military service _____

Discharge rank _____

Attitude toward being in the service _____

Family

13. Spouse's name and occupation

14. Spouse's education

15. Spouse's interests

16. Anniversary

17. Children, if any, names/ages

18. Children's education

19. Children's interests (hobbies, problems, etc.)

Business Background

20. Previous employment: (most recent first)

Company

Location

Title

Dates _____

Company

Location

Title

Dates _____

21. Previous positions at present company:

Title

Dates _____

22. "Status" symbols in office

23. Professional/trade

24. Offices held or honors

25. What business relationship does he/she have with others in our company?

26. Who are they?

27. Is it a good relationship? Why?

28. What other people in our company know the customer?

29. Type of connection

Nature of relationship

30. What do you feel is his/her long-range business objective?

31. What do you feel is his/her immediate business objective?

32. What do you think is of greatest concern to the customer at this time--the welfare of the company or his/her own personal welfare?

33. Does the customer think of the present or the future?

Special Interests

34. Clubs, fraternal associations or service clubs (masons, Kiwanis, etc.)

35. Politically active?

Party:

Important to customer?

36. Active in community? How?

37. Religion

Active?

38. Highly confidential/sensitive items *not* to be discussed with customer (i.e.: Divorce, AA member, etc.)

39. On what subjects (outside of business) does the customer have strong feelings?

Lifestyle

40. Medical history (current condition of health)

41. Does customer drink? If yes, what and how much?

42. If no, is customer offended by others drinking?

43. Does customer smoke? If no, object to others?

44. Favorite places for lunch:

Dinner

45. Favorite items on menu

46. Does customer object to having anyone buy his/her meal?

47. Hobbies and recreational interests

48. Vacation habits

49. Spectator sports interest: sports and teams

50. What kind of car(s)

51. Conversational interests

52. Whom does the customer seem anxious to impress?

53. How does he/she want to be seen by those people?

54. What adjectives would you use to describe the customer?

55. What is he/she most proud of having achieved?

56. What do you feel is the customer's long-range personal objective?

57. What do you feel is the customer's immediate personal goal?

The Customer and You

58. What moral or ethical considerations are involved when you work with this customer?

59. Does the customer feel any obligation to you, your company or your competition? If so, what?

60. Does the proposal you plan to make to him/her require the customer to change a habit or take an action that is contrary to custom?

61. Is he/she primarily concerned about the opinion of others?

62. Is he/she very self-centered?

Highly ethical?

63. What are the key problems as the customer sees them?

64. What are the priorities of the customer's management?

65. Can you help with these problems?

66. Does your competitor have better answers to the above questions than you have?

<http://www.harveymackay.com/tools/mackay66.cfm>

A Checklist for Attitudes about Partnering with Residents and Families

Adapted from Jeppson, E., & Thomas, J. (1994). *Essential Allies: Families as Advisors*. Available from Institute for Family-Centered Care, Bethesda, MD.

Use this tool to explore attitudes about patient and family involvement in their own health care. It can be used for self-reflection and as a way to spark discussion among staff and physicians before beginning to work with advisors as members of quality improvement, policy and program development, and health care redesign teams.

Answer and discuss the following questions:

- Do I believe that residents and family members bring unique perspectives and expertise to the clinical relationship?
- Do I encourage residents and families to speak freely?
- Do I listen respectfully to the opinions of residents and family members?
- Do I encourage residents and family members to participate in decision-making about their care?

At the organizational level:

- Do I consistently let colleagues know that I value the insights of residents and families?
- Do I believe in the importance of resident and family participation in planning and decision-making at the program and policy level?
- Do I believe that residents and families bring a perspective to a project that no one else can provide
- Do I believe that residents and family members can look beyond their own experiences and issues?
- Do I believe that the perspectives and opinions of residents, families, and providers are equally valid in planning and decision-making at the program and policy level?

If you have experience working with advisors on committees and teams, answer and discuss these additional questions:

- Do I understand what is required and expected of residents and families

who serve as advisors and/or members on committees and teams?

- Do I help them set clear goals for their roles in these efforts?
- Do I feel comfortable delegating responsibility to advisors?
- Do I understand that an illness or other family demands may require advisors to take time off from their responsibilities?

Selecting, Preparing, Supporting Patient and Family Advisors

from the INSTITUTE FOR FAMILY-CENTERED CARE

7900 WISCONSIN AVENUE, SUITE 405, BETHESDA MD 20814

While this is prepared for patients; nonetheless, there are takeaways here for long-term care providers as well. I have edited it accordingly.

Selecting Advisors

In identifying patient and family advisors, look for individuals who have demonstrated an interest in partnering with providers in the care of a family member. Consider those who have offered constructive ideas for change and who have a special ability to help staff better understand the resident or family perspective.

Seek individuals who are able to:

- Share insights and information about their experiences in ways that others can learn from them.
- See beyond their personal experiences.
- Show concern for more than one issue.
- Listen well.
- Respect the perspectives of others.
- Interact well with many different kinds of people.
- Speak comfortably in a group.
- Work in partnership with others.
- Show a positive outlook on life and a sense of humor.

To find individuals with these qualities and skills, ask clinicians for suggestions. Review letters or emails from former resident or families that have provided constructive feedback. Include information about advisors on your web site. Ombudsman, community outreach workers and current advisors may also be able to identify potential advisors. Contacting community support groups and is another way to find individuals who might be interested in serving as advisors.

Informing About Roles and Responsibilities

Before individuals can make decisions about whether they wish to participate, they should be informed of the responsibilities and privileges associated with the role. A fact sheet containing the following information, as relevant, can be prepared and offered to individuals who are being asked to participate:

- Mission and goals of the organization.
- Expectations for their participation.
- Meeting times, frequency, and duration.
- Travel dates.

- Expectations for communication among team members between meetings (including means of communication – email, mail, phone, etc.).
- Time commitment beyond meeting times.
- Compensation offered.
- Benefits of participation (i.e., what are the expected outcomes of their involvement).
- Training and support to be provided.

Compensation

At a minimum, the program should reimburse for expenses incurred in association with their work with the team (e.g., parking, transportation, child care). Many programs also offer stipends or honoraria for participation in meetings. These payments typically range from \$12 - \$25 per meeting. Consider the needs advisor and ask about their preferences.

Preparing and Supporting Advisors

In order for to participate effectively as advisors and/or members of improvement teams, appropriate orientation, training, preparation, and support should be offered. They should have a chance to discuss their questions or thoughts about the work with an identified staff member who is willing to serve as a liaison to the advisors.

The orientation for patient and family advisors should include information on the following:

- The mission, goals, and priorities of the organization.
- Person-centered care.
- HIPAA and the importance of privacy and confidentiality.
- Specific skills and knowledge needed to be an effective team member.

If the organization has a volunteer program, its orientation and training may be very useful for advisors. Other training topics may include:

- Speaking the organization’s language, “Jargon 101.” While it is best to reduce the amount of jargon used in meetings, sometimes it is impossible to completely eliminate jargon. If there are terms that will be used frequently, make sure that advisors understand them. Encourage them to ask for an explanation of anything they don’t understand.
- Who’s who in the organization or on the project team and how to contact other team members.

- How to prepare for a meeting: what to wear, what to do ahead of time, and what to bring.
- How meetings are conducted: format, agenda, minutes, roles (e.g. facilitator, secretary, timekeeper).
- Technologies that will be used (e.g., conference calls, web-based tools).
- Effective communication skills:
 - o Expressing your perspective so others will listen.
 - o How to ask tough questions.
 - o What to do when you don't agree.
 - o Listening to and learning from the perspectives of others.
 - o Thinking beyond your own experience.

It is extremely helpful for new advisors to have a “coach” or mentor who can provide informal ongoing support to them. A member of the team who has experience working on similar initiatives and is willing to serve as a liaison or an experienced patient or family advisor can be assigned to this role. This person should insure that patient and family advisors are prepared for each meeting. During meetings, this person can also actively encourage participation of the advisor. Also they can debrief after each meeting to determine what additional information or resources advisors need. Most importantly, they can support advisors in participating fully on the team by providing feedback and encouragement.

Believe Resident and Family Participation is Essential

The single most important guideline for involving people in advisory roles and as members of improvement teams is to believe that their participation is essential to the design and delivery of optimal care and services. Without sustained participation in all aspects of policy and program development and evaluation, the health care system will fail to respond to the real needs and concerns of those it is intended to serve. Effective partnerships will help to improve health care and advance collaborative self-management support. It will lead to better outcomes and enhance efficiency and cost-effectiveness. Providers will also discover a more gratifying, creative, and inspiring way to practice.

Information about Anthony Cirillo

Mr. Cirillo is president of Fast Forward Consulting, an international healthcare marketing consultancy and Anthony's Song, devoted to senior advocacy and educating the public about aging issues.

Prior to launching his companies, he helped launch a Wall Street healthcare startup that worked with seniors throughout the boroughs of New York. Prior to that he served as chief marketing officer for several hospitals in the northeast U.S.

He holds a Masters Degree in Organizational Dynamics from the University of Pennsylvania and is a Fellow of the American College of Healthcare Executives.

An accredited business communicator of the International Association of Business Communicators, he also provides counsel to Fortune 500 companies. He helped launch and directed all marketing for Unisys Corporation Unisys University. And, he started his career as a radio and television producer and on air talent.

Mr. Cirillo offers a variety of services to long-term care providers. Essentially they revolve around resident experience, culture change, strategic marketing, telling your story, cultivating ambassadors for your company, and educating the public about aging issues.

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www.4wardfast.com / www.anthonysong.com

Consulting Services

Do you have a nagging feeling that your marketing programs are not working?

We do one thing - reposition your organization for success.

Through an exhaustive evaluation, we help you target precisely, attract residents, document effectiveness, spend less, define experiences and leverage customer crusaders.

"Anthony has been most effective in quickly analyzing the strengths and weaknesses of my organization's marketing plan with a minimum of resistance or denial. He didn't stop there, however. He used a combination of experience, creativity, and style to retool my team's thinking and approach toward the plan into a full-endorsed strategy for the future. The engagement was a success story."
Robert Wise, CEO, Hunterdon Medical Center

"Because of his extensive marketing and communications background, Anthony is one of the most versatile consultants I've ever partnered with. He can work independently with top executives as well as frontline management. And his extensive expertise in healthcare has provided my organization with value that few others can match."
Jim Tobalski, Senior Vice President, Novant Health

Strategic Focus - Proven Results

- CEO and CMO counsel
- Marketing Plan development
- Marketing Department Repositioning
- Facilitation
- Identify and Leverage Customer Crusaders
- Public Relations and Crisis Communications
- Create sales, call centers and marketing functions
- Brand and market a startup
- Re-brand and position an existing company
- Community Relations, Government Relations, Advocacy program development
- Leverage special events for strategic gain
- Foster culture change within an organization
- Provide strategic internal communication counsel to engage employees
- Baby Boomer Marketing

Anthony combines best practices in healthcare and other industries to create innovative solutions for his clients. He provided excellent suggestions on how we could maximize our marketing and even gave a few ideas that are not used in healthcare at all - yet. He brings a unique perspective to the table and I value his insight. I will definitely work with him again. Any organization who hires him will get more than they request due to his thoroughness, knowledge of industry trends and creativity. Anthony lives outside of the box but understands the challenges of working within one. He finds a way to help businesses expand what they are doing because it's strategic, smart and profitable. I have no reservations about hiring Anthony again or recommending him. I would also note that as a personal principle I generally don't recommend consultants or agencies to people, but in Anthony's case I am happy to speak his praises.

Kati Everett, APR, Director of Marketing,
Southern Piedmont Region, Novant Healthcare

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We contend that you could suspend traditional advertising and see little downside. Instead, build a true marketing plan that focuses and targets your efforts. Capture the right customer data, always have a call to action and measure the right returns. Build cutting edge technology and tactics into your mix. Do this and you will reduce marketing expense, focus resources and skills for increased productivity, target your marketing efforts, clearly measure specific returns on your investment and gather data that will help improve and tailor the healthcare experience, fueling viral marketing.

Our Values

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- **Do what's right. Do it once. Get it right.**
- **Be visionary.
Plan now for the anticipated future.**
- **Fast Track.**
- **Focus on the details of implementation**
- **Focus on Results.**

Call us today: (877) 278-8791

Empowering Excellence – A One Day Program That Will Transform Your Facility

Let us come to your facility for the day and create change that will last for years. This event will have your staff excited, administrator elated and residents gleeful.

To provide excellence in care giving you need to empower staff. Empowered staff turns over less frequently. More consistent care leads to better outcomes and resident and family satisfaction.

So here is where we start.

Many times staff members feel that they are in a low paying job not in a career with a future. We show them that:

- *they are a brand.*
- *as a brand you are more than a resume but someone who conveys an image that reflects on yourself and on your employer.*
- *looking at it this way, ultimately you set the highest standards for yourself and when you work for yourself you achieve and take on more because you have a vision of where you want to go.*

We cover: SWOT analysis, your career positioning, your five year plan, your package – your name, look and how you speak, networking, self-promotion, documenting your successes and becoming a highly valued contributor.

With the staff enthused and empowered we then cover *specific customer service skills* for success. But then we tie it to the bigger picture.

In our “Turning Customers into Crusaders” portion of the program, we show how delivering exceptional experiences is directly related to marketing. Learn:

- *how to foster word of mouth marketing.*
- *how to audit the experience.*
- *how to identify and engage loyalists.*
- *how to build community, create brand extensions, adopt causes for strategic gain.*
- *how to intersect non-ltc priorities of influencers to build long term relations.*
- *how to market to baby boomers.*

Don't take our word....



AHCA National Convention (above): 4 Stars

Virginia Health Care Association

"Anthony was amazing! He would make a great option for a one day conference/seminar!"

"Anthony's presentation was very lovely and interesting - fresh ideas."

"Excellent presentation, vibrant - wonderful messages."

Ohio Health Care Association

"Great, best presenter at conference. He was fun, knowledgeable and had a great workbook. Thanks for inviting him."

"Tony was very interesting and helpful. He was very engaging with the audience."

"The speaker was professional, interesting, prepared and very good. Thanks."

Minnesota State Wide Activity Professionals

"Very excellent information. Able to take it back and use in my facility."

"Very well presented and I love the motivation of music."

"It is nice to have handouts/playbook to go back and work with."

Senior Living Solutions

From Anthony's Song

We're more than just a keynote speech. As a credentialed healthcare professional, Anthony consults with healthcare organizations worldwide.

His marketing experience and his passion for older adults has resulted in products and services that can help you motivate management and staff; engage residents, families, the community and media; build brand loyalty and awareness; while setting the stage for increased occupancy.

"Anthony's impact was profound, with staff, residents, families and community members raving for weeks. He helped focus our mission and build brand awareness and enthusiasm."

Dale Ann Putnam, Administrator
Mecklenburg Healthcare Center, Charlotte, NC

The One Day Marketing Crusade

The benefits:

- help build morale and retain staff
- build customer loyalty and word of mouth marketing
- build good will in the community
- increase top of mind awareness
- focus limited marketing resources for maximum effect

The One Day Marketing Crusade is a unique "event" customized for your facility that engages all of your internal and external audiences and focuses attention on your facility and its mission.

We spend an entire day at your facility and offer:

- A dynamic management in-service
- A motivating CEU session for employees
- A concert for residents and families
- A community educational event and book signing for "Who Moved My Dentures?"
- A marketing consultation
- Potential PR and media coverage

For Your Activities Program

We have produced 12 CDs and accompanying activity guides, one for each month of the year. The Guides explain the themes, why we chose the songs, a history of the song and/or artist, a history of the occasion celebrated as well as suggested activities. Guides range from 50-70 pages and include song lyrics. They are featured in the Sea Bay Game catalog.

Preview them today.

Buy each CD and its Guide as a package for \$44.95. Buy all 12 sets for \$400, a savings of more than 25%. Free shipping.

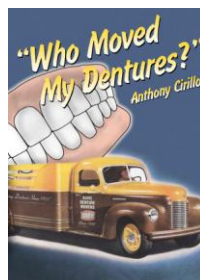
"I think that you have assembled quite an impressive group of activities for activity directors to use with their residents. I really appreciate all of the "background" information that accompanies each and every song that you have on your CD's. The activities themselves allow for interaction among the facilitators and fellow residents as well. By using a suggested materials section at the beginning of each month's guide it makes it easy to plan and possibly elaborate on the structure that your guide offers. Thank you for sharing your work with me. I think you are doing a wonderful job!"

Martine Bullard, MT-BC
Music Therapist – Board Certified
Mayview Convalescent Center, Raleigh, NC

A Review from Amazon:

"I wish I had this book when I had to weigh my options! Cirillo covered most of the relevant issues, and also provided some nice life-lessons for us all. Cirillo writes in a very casual style. You almost feel like you are sitting down with a story teller, who happens to be a trusted friend. His allusions to his "old neighborhood" of South Philadelphia provide a nice slice of life. You can tell that Cirillo speaks from experience and with a passion for his commitment to long term care. This is not the cold synthesis of a researcher; rather stories with a purpose from a warm-hearted, well-organized educator, entertainer, and long term care professional. This book is something that every potential client for long term care should read."

For Your Community Relations Program



Consider this book as a marketing tool. "Dentures" demystifies long-term care through human interest stories of seniors I have had the pleasure to meet. The book offers a way to learn about senior options in a non-threatening way as illustrated through the heart and soul of the people who are living in these facilities daily.

\$15 – bulk discounts available.

Activity Guides and CDs / CDs / Book – Who Moved My Dentures?

Name: _____

Address: _____

Phone: _____

Email: _____

	CD only	Guide only	CD & Guide
Welcoming in the New Year	_____	_____	_____
Be My Valentine	_____	_____	_____
Pasta and Potatoes	_____	_____	_____
April Showers	_____	_____	_____
Celebrating Our Heroes	_____	_____	_____
June Tunes	_____	_____	_____
Summer Celebration	_____	_____	_____
Some Enchanted Evening	_____	_____	_____
Fall Fever	_____	_____	_____
Moonbeams and Magic	_____	_____	_____
Giving Thanks	_____	_____	_____
Holiday Memories	_____	_____	_____

Total for Activity Guides:

CDs only \$15 each x _____ = _____

GUIDES only \$35 each x _____ = _____

CD&GUIDES \$44.95 each x _____ = _____

Add:

Who Moved My Dentures?
\$15 each x _____ = _____

Additional CDs
Songs for a Rainy Night
\$15 each x _____ = _____

The Meaning of Life
\$15 each x _____ = _____

Sinatra Double CD
\$25 x _____ = _____

**Sub Total Products
without Shipping**

Shipping

\$2 x _____ (\$2 per individual CD and
the book, Who Moved My Dentures?)

\$3 x _____ (\$3 per individual Guide)

\$5 x _____ (\$5 each per activity set;
1 CD and 1 Guide)

Sub Total:

NC residents

Add 8.25% sales tax to sub total =

Total:

Send form and check payable to “Anthony’s Song” to:
15645 Northstone Drive, Huntersville, NC 28078
(Items will be shipped upon clearance of check.)

Visit us and join the mail list at
www.anthonysong.com

