

Whitepaper: Roundtables 101

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Building the relationship is more important than ever in today's digital age. Information can be found everywhere. It's the relationship that makes the sale.

For the past three years the smaller, more intimate gathering has been the intermediate step to help us build a relationship with the prospects. We call the gathering a roundtable discussion. It can be the step between an informational luncheon or other on-site activity and a one-on-one appointment. Or it can be a first step for someone that does not want to attend another luncheon directed at seniors!

We have continued to modify the discussion to fit our needs. We have done free form discussions to specific topics. Two popular topics have been about finances and lifestyle. Tailor the topics to what your prospects are saying.

Invitations can be sent to prospects that have attended a prior event but have been unwilling to come in for a follow up appointment. Another group might be those that have requested information but have not been to the community yet. We have done simple invitations in the office. If it is someone you would really like to come in, try hand addressing the envelope.

Limit the number of attendees to no more than 6 or 8. If the date fills move the extra folks to another date. It helps create a sense of urgency if the published date is full. The event is easy to set up so adding a date should not be an issue.

Light refreshments are offered. Cookies, lemon bars, fresh fruit, and coffee, tea, or water comprise the menu. Make it nice with china, napkins, and glasses. Fresh flowers from the local grocery store are a nice touch. We have note pads and pens for note taking.

We have typically hosted them in the office or a small room in the community. It starts at 2:00 and finishes when the questions are done. We offer a tour for those that would like to see the model or an available apartment after the discussion.

Be prepared! Sometimes the event can go on for several hours. That is ok. The prospect is gaining familiarity with you and the community. And you are learning their "hot buttons", desires, and needs. They also get to interact with the other nice people in the room. They hear questions they may not have thought of.

This makes the one-on-one appointment more productive; there is already a mutual trust.

This type of event is also great for building the future residency program. The prospect gets the information needed, but does not need to get beyond deciding what type of apartment they might desire.

A nice follow up note and call is appropriate to maintain the friendly relationship. This event is so effective and so inexpensive. We have made it a part of our monthly calendars. It gets us in front of prospects and that is when we can be the most effective; no one else but you can build that relationship!