



angell
MARKETING

Sagewood

Tuesday, December 10, 2019



Welcome and Introductions

Sagewood

- Stewart Ingram
- Ellen Devine
- Erik Gjullin
- Scott Doherty

Angell Marketing

- Wynne Angell
- Dawn Sigmen
- Lesli Knee
- Meredith Ordonez



Who We Are

Marketing Agency with 100% Focus on Senior Living

- New Developments
- Expansions
- Operational Communities
- Health Services



Agency Organization

Leadership

Wynne Angell
President, CEO

Lesli Knee
Vice President
Director/Client Services

Dawn Sigmen
VP, Director of Client Strategy

Client Services

Carissa Valenzuela
Account Supervisor

Meredith Ordonez
Account Supervisor

Dena Wholey
Senior Account Executive

Ellyce Redmond
Senior Account Executive

Hannah Wessel
Account Executive

Brittany Riggs
Account Executive

Rachel Davis
Assistant Account Executive

Alex Whitten
Assistant Account Executive

Sara Riscoe
Account Coordinator

Creative Services

Doug Gilliatt
Creative Director

Keith Boaz
Senior Art Director
Videographer

Janell Browning
Senior Art Director

Blake Lookabill
Senior Designer

Loren Nichols
Senior Designer

Christine Knauer
Senior Writer

Jane Wooldridge
Senior Writer

Lisa Wilhelm
Senior Writer

Digital Marketing

Morgan Eichsteadt
Senior Marketing Strategist

Nathalie Warner
Content Strategist

Aaron Guetzlaff
Senior Web Developer

Amy Penny
Project Manager

Lindsay Campbell
Project Manager

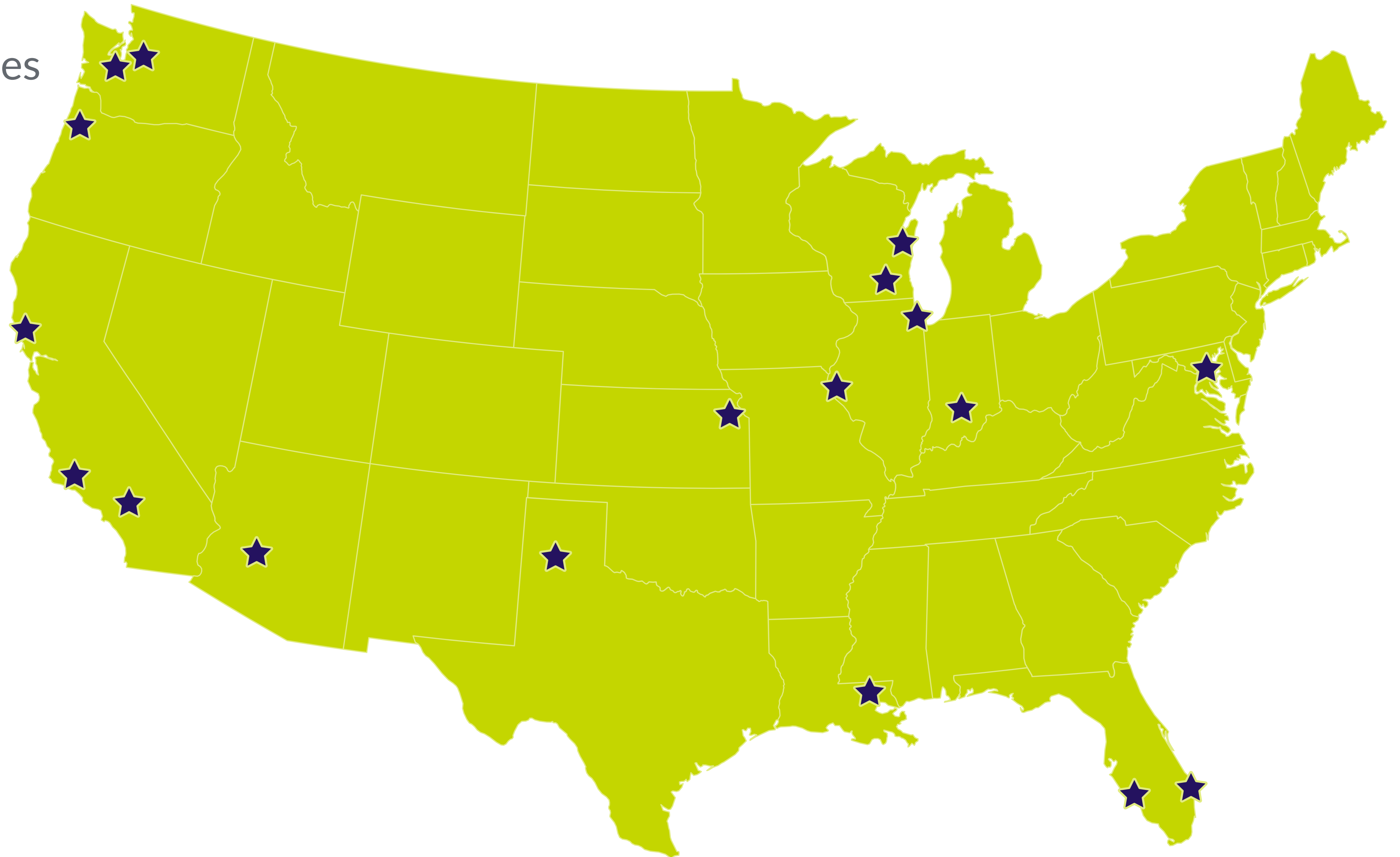
Agency Support

Nikki Rosa
Office Manager
Executive Assistant

Kim Deal
Bookkeeper/HR

Communities We Serve

- 21 Communities
- 11 States



Our Approach

Angell Marketing has developed a 3D process that helps our senior living and healthcare clients achieve outstanding sales and marketing results. It's about examining everything that affects your brand to identify opportunities and ensure that the marketing communications plan we develop for you and the services we provide are as informed and effective as possible.

With the clock always ticking, we make every effort to accomplish this process quickly and move on to helping you get the results you need.



Sagewood Objectives

- Maintaining **96% occupancy** in Sagewood IL
- Maintaining **96% sold** in Sagewood IL Phase II and completing fill-up of this new phase within four months after move-ins commence at end of first quarter 2021
- Achieving and maintaining **95% occupancy** (42 occupied residences out of 44 with an average census of 19 of these being direct entry private pay) in Desert Willow AL
- Achieving and maintaining **95% occupancy** (27 occupied residences out of 30 with an average census of 6 of these being private pay direct entry) in Rosewood/Cottonwood MC
- Achieving and maintaining an average of **96% occupancy** (74 occupied beds out of 78 with an average census of 8 private pay) in Acacia HC

Resident Profile

Sagewood IL residents (including Phase II depositors)

- Average Age = 79
- 63% couples
- Median home value = \$625,000
- Median annual income = \$116,947
- Median total assets = \$3,125,000

Desert Willow AL residents

- Average age = 86 (private pay)
- 3% couples
- 60% original IL Sagewood residents

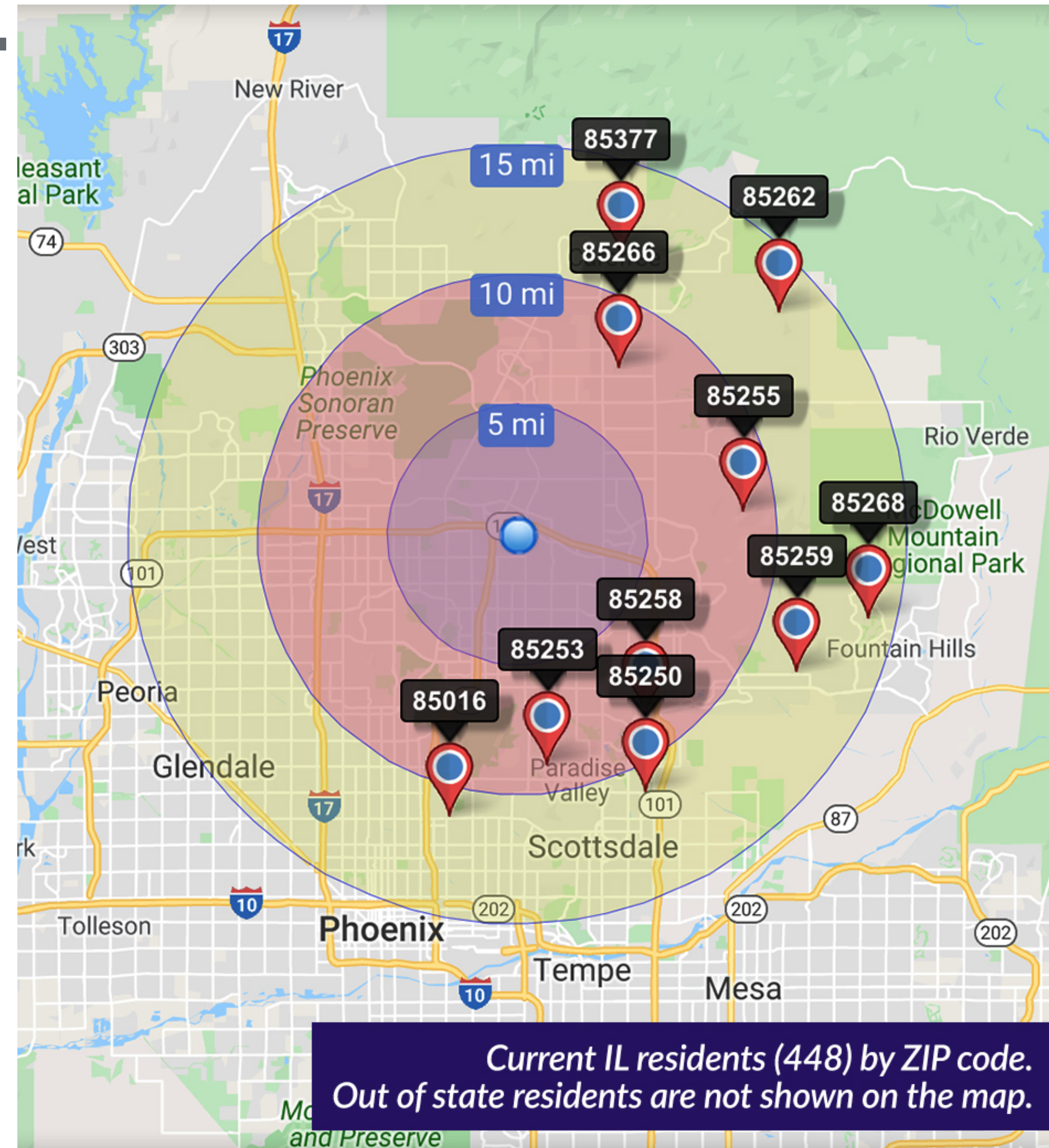
Rosewood/Cottonwood MC residents

- Average age = 92 (private pay)
- 0% couples
- 80% original IL Sagewood residents

Acacia residents

- Average age = 88 (private pay)
- 0% couples
- 77% original IL Sagewood residents

Current I/L lead base = 3,562 leads



Target Audience Funnel

Initial Inquiries

Leads

**Wait List Depositors
& Phase II Depositors**

Consumer Personas

A consumer persona offers a window into the mindset of a key segment of your target audience. It looks at everything from what motivates them, to what excites them, to what worries them. As such, each persona provides an important framework for crafting carefully targeted marketing efforts for each market segment.

Persona #1: On-Board

Virginia & Bill

Couple who has reserved a new residence that is currently under construction.

This couple seems very enthusiastic about their new residence at Sagewood. However, we know they are never 100% committed until they actually move in. During the construction process, they have time to second-guess their decision. The excitement might wear off a little. And they might start to get overwhelmed by all the details of the move. That's when they need reassurance, support and maybe a little hand-holding.

Marketing goals:

- Reinforce their decision
- Engage them in the community lifestyle
- Make them feel like part of the Sagewood community even before moving here

Examples:

- Letters, emails and e-newsletters with information about construction progress, construction milestones and projected move-in dates
- Regularly scheduled events, both social and move-in preparation
- Personal notes, birthday/anniversary cards



Persona #2: Circling

Barbara

Single woman who has inquired about Sagewood and shows great interest in moving here.

While she's basically sold on the idea of Sagewood, her preferred residence option isn't currently available. She'll likely join the waitlist. However, until she does, she still might look at other options. Her timeline could be immediate, or she might be planning ahead for a future move. Either way, we need to nurture her as a current lead and waitlist member—and make her feel as though there's no reason to look anywhere else.

Marketing goals:

- Sales team remains in close contact with this lead, supported by key marketing efforts
- Engage them in events for other wait list members, as well as some events with depositors for new residences
- Consistently reinforce the key advantages of moving to Sagewood

Examples:

- Letters, emails and e-newsletters with information about construction progress, construction milestones and projected move-in dates
- Regularly scheduled events, both social and move-in preparation
- Personal notes, birthday/anniversary cards



Persona #3: Proactive Adult Child

Lisa

Adult daughter of parents who have a winter home in the Phoenix area.

It's been great having her parents spend winters in the condo they bought in Scottsdale. But the trips back-and-forth to their home up north are starting to wear on them. She thinks it's time for them to consider living in Arizona full-time, ideally at a senior living community with on-site health services. She knows it will be a "tough sell," so she's getting the ball rolling. At this point, all senior living communities seem alike to her. She needs to see what sets Sagewood apart, and makes it a good fit for her parents.

Marketing goals:

- Educate about the LifeCare concept—an active lifestyle today plus the security of on-site care at a predictable cost
- Give adult child resources to help educate parents
- Make it convenient for adult children to connect with Sagewood

Examples:

- Specific communications during the winter months, including targeted letters and emails with information about the Sagewood lifestyle or testimonials from other adult children of Sagewood residents
- Digital marketing efforts including SEO, SEM and marketing automation
- Winter visitor mailing campaign
- Event forums specifically for adult children
- Family-oriented events for grandparents, adult children and grandchildren



Persona #4: Concerned Adult Child

Sarah

Adult daughter of local parent who needs assistance and/or has Alzheimer's/dementia.

Ever since her mom passed away, Sarah has been spending more time with her dad. She's noticing signs of confusion and loss of words, and the symptoms are getting progressively worse. With her siblings living out of state, the responsibility falls on her to figure out next steps. After an incidence of wandering away from home, she knows her dad needs to be in a safe environment where he can get round-the-clock care, and have opportunities to socialize and participate in activities. She wants the very best for her dad—ideally in a care community close to her home.

Marketing goals:

- Educate about the new assisted living and memory care options at Sagewood
- Give adult child resources to help educate parents and other family members
- Make it convenient for adult children to connect with Sagewood

Examples:

- Targeted letters and emails with information about Sagewood assisted living and memory care
- Digital marketing efforts including SEO, SEM and marketing automation
- Event forums specifically for adult children



Independent Living Creative Samples

Moving Made Easy

From the moving process to enjoying your new special.

You to Move

Tues 10:00

Stretch 1045 H

Will Call

OWNED AND MANAGED

THINKING ABOUT

Making a Move

BUT NOT SURE WHERE TO START?



You choose the TEMPO, we'll make sure you don't miss a beat!



SEM Campaigns

Retire In Luxury | Exclusive Independent Living | The Glenview At Pelican Bay

glenviewnaples.com/Senior_Living/Naples (239) 431-2652

Enjoy Premier Retirement At The Glenview In Naples, Florida. Active Senior Living Is Vibrant & Cultural When You Choose Our Community. Schedule A Tour!

Luxurious Coastal Views · First-Class Amenities · Life Plan Community · Premier Experiences

[Our Community](#)

[Health Center](#)

[Home Care](#)

[Get In Touch](#)

Independent Senior Living | Rental Plaza Apartments | Beatitudes Campus Retirement

beatitudescampus.org/Apartments/Phoenix (602) 910-2795

Leasing Makes Life Easy In Our Independent Living Apartments At Beatitudes Campus. Receive Your 4th & 8th Months Free With A One-Year Lease Agreement On Plaza Apartments!

Assisted Living · Skilled Nursing · Health Services · Independent Living

[Residences](#)

[Our Community](#)

[Dining Options](#)

[Contact Us](#)

Independent Living (The Glenview at Pelican Bay)

Clicks: 7,733 - Impressions: 122,809 - CTR: 6.30% (2% is average)

Incentives/Promotions (Beatitudes Campus)

Clicks: 5,435 - Impressions: 56,297 - CTR: 9.65% (2% is average)



www.EvergreenOshkosh.com



Assisted Living & Memory Care Creative Samples

Working Together

A Refreshing Way to Work Together

- We Are Your Partner - Information Sharing is a Two-Way Street
- Project Timelines & Weekly Calls to Keep Everyone on Track
- Analyze Results and Compare to Goals - Adjust Strategy as Needed
- No Surprise Invoices That Work Within Your Budget

Why Angell Marketing

- Local
- Full Service Boutique Agency
- 100% Focus on Senior Living
- Strategic Partner



QUESTIONS

THANK YOU