



# Virticalogic

A newsletter for thinking + feeling people alike

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## The Power of Three: Capturing 3 Key Words for Meaningful Follow-Up

With multiple prospects in your CRM, quick recall becomes easier when you jot down 3 key words that create a mental snapshot of each person. These 3 descriptive words capture the prospect’s unique situation, helping you quickly retrieve details for follow-ups, personalized visits, and meaningful invitations to join your community.

**1st Meeting.** On a hot and humid Florida day, Mary Jane E. arrived at our community looking for dementia care for her husband Ed. She was sad, angry, feeling guilty, and crying. The police had brought Ed home again yesterday and she said “I’ve hit the wall! I must find someplace for his safety and my sanity.” I brought her an iced tea and as she relaxed and began sharing her story and feelings, I listened attentively while thinking about the 3 words that would help remind me for my follow-up.

**Connecting in Discovery.** There had been changes in her home. Her daughter had left for college and her help with Ed

was missed, and her stepson was unhappy about a move to assisted living for his dad. She was also babysitting her granddaughter, Emily, 2 days a week and one weekend. She loved coloring with her and playing in the park, but both activities were constantly interrupted by Ed, a retired house painter who was always wandering around the neighborhood looking for houses to paint. We visited for an hour and toured for another.

**3 Words.** My approach to follow-up centers on capturing 3 words as reminders and seeds to grow a positive relationship and vibe with each prospect. My 3 words for follow-up communications with Mary Jane were – **Safety, Painter, and Emily.**

When you creatively infuse your follow-ups with imaginative use of these personal details, you demonstrate that you truly listened and value their journey. In senior living sales and across aging services, these 3 words can be a powerful key to fostering trust, engagement, and a lasting positive vibe.



See flyer for details.

Collaborative Coaching with Directors & Supervisors for Cultural Growth, Sales, Outreach Marketing & Networking to Elevate Marketplace Presence

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