

# COMMUNITY NAME TWELVE-MONTH SALES AND MARKETING REPORT AS OF February 8, 2015

For the Week Ending 2/8/15

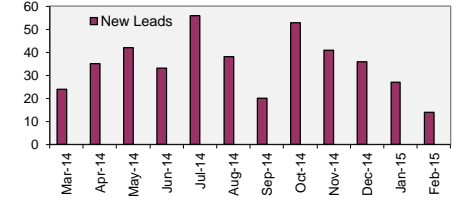
Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	Jan-15	Feb-15
--------	--------	--------	--------	--------	--------	--------	--------	--------	--------	--------	--------

Total      Monthly Avg      Total      Monthly Avg

<b>LEADS</b>													
New Leads	29	24	35	42	33	56	38	20	53	41	36	27	14

<b>12-Month</b>	<b>FY2015</b>
419	34.92
171	38.86

<b>Count by Status</b>													
Hot Lead	11	6	2	6	1	8	10	9	4	2	7	6	8
Warm Lead	28	85	82	67	65	62	74	78	79	94	100	102	101
Cool Lead	408	512	514	525	589	590	625	601	689	789	655	650	650
Future Lead	80	2	7	8	10	12	16	14	12	18	34	41	50
No Counselor Contact Yet	14	12	8	7	70	60	45	45	47	52	55	54	56
<b>Current Active Leads</b>	<b>1256</b>	<b>1452</b>	<b>1236</b>	<b>2781</b>	<b>2787</b>	<b>2775</b>	<b>2884</b>	<b>2884</b>	<b>2644</b>	<b>2703</b>	<b>2659</b>	<b>2412</b>	<b>2338</b>



Lost Leads	2433	1023	1345	1395	1503	1535	1230	1231	1456	1560	1564	1652	1522
------------	------	------	------	------	------	------	------	------	------	------	------	------	------

<b>DEPOSITS &amp; CANCELLATIONS</b>													
10% Deposits	1	2	5	1	3	6	4	2	1	2	5	4	7
10% Cancellations	0	0	1	2	0	1	0	2	3	0	1	1	2
<b>Net 10% Deposits</b>	<b>1</b>	<b>2</b>	<b>4</b>	<b>-1</b>	<b>3</b>	<b>5</b>	<b>4</b>	<b>0</b>	<b>-2</b>	<b>2</b>	<b>4</b>	<b>3</b>	<b>5</b>

<b>12-Month</b>	<b>FY2015</b>
42	3.50
13	1.08
29	2.42
19	3.80
7	1.40
12	2.40

<b>IL OCCUPANCY</b>													
Move-Ins/Closings	0	2	6	4	5	2	3	6	2	1	2	4	2
Move-Outs/Attrition	2	1	2	3	1	0	2	5	2	3	1	4	2
<b>Net Gain in Occupancy</b>	<b>-2</b>	<b>1</b>	<b>4</b>	<b>1</b>	<b>4</b>	<b>2</b>	<b>1</b>	<b>1</b>	<b>0</b>	<b>-2</b>	<b>1</b>	<b>0</b>	<b>0</b>

<b>12-Month</b>	<b>FY2015</b>
39	3.25
26	2.17
13	1.08
11	2.20
12	2.40
-1	-0.20

Occupied IL Residences	138	126	130	131	135	137	138	139	139	137	138	138	138
------------------------	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----

<b>ACTIVITY</b>													
Total Completed Calls (In and Out)	130	856	456	789	744	486	689	920	1021	1022	895	759	1023
Initial Sales Presentations	5	15	19	20	21	12	22	21	21	23	24	31	12
Subsequent Sales Presentations	8	23	20	15	22	9	19	13	27	10	19	19	24
Event Attendees	22	3	10	12	8	4	2	4	3	15	12	71	12

<b>12-Month</b>	<b>FY2015</b>
9,660	805.00
241	20.08
220	18.33
156	13.00
4,720	944.00
111	22.20
99	19.80
113	22.60

<b>Timing of Next Activity with Active Leads</b>												
Overdue	2502		4004	3872	3956	3958	3871	3716	3709	2618	2648	2502
None Scheduled	3589		4007	3960	3954	3947	3937	3915	3898	3510	3511	3589
In Future	2209		848	1099	1081	1171	1287	1379	1417	2454	2368	2209

### Conversion Rates

### Average Years

New Leads to Initial Presentations  
Meetings to Sales  
Leads to Sales  
Sales to Cancellations

<b>12-Month</b>	<b>FY2015</b>
1.74	58%
13.69	7%
14.4	7%
3.23	31%

1.54	65%
18.67	5%
14.3	7%
2.71	37%

<b>Taylor Reporting Averages</b>	
3	31%
16	6%
24	4%
5	20%

From Inquiry to Deposit      From Deposit to Move in

2014	2.30	0.60
2015	1.20	0.20
TRS Average:	2.70	0.39

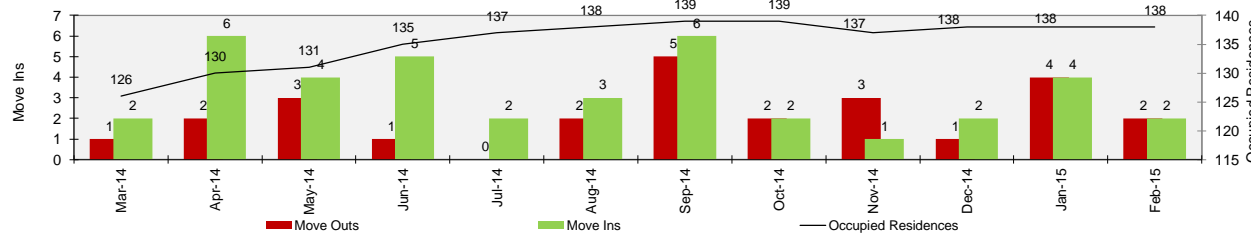
Read: It takes 14.4 leads to generate one sale. Put another way, 7% of leads turn to sales.

### Marketing Costs

Per Lead (YTD):	\$125.63
Per Move in* (YTD):	\$5,982.30

\* Gross move-in numbers

### Occupancy



**COMMUNITY NAME**  
**2015 ACTIVITY REPORT**  
 Data for Week Ending: February 8, 2015

**Sales & Marketing Activity w/ Leads**

	One-on-One Appointments			Completed Calls			Results of All Calls			Personalized Mail-Outs/ Emails	10% Deposits		
	Initial Presentations	Follow-Up Appointments (w/ leads)	Appointments w/ Depositors	Completed Outgoing Calls	Completed Incoming Calls	Total Completed Calls	Conversation Had, Nothing Scheduled	Left Voicemail or No Answer	Scheduled Meeting, Tour or Event		New Deposits	New Cancellations	YTD Net Sales
Minnie Mouse	1	9	2	43	12	55	49	50	6	22	1	0	2
Fred Flinstone	0	0	5	14	6	20	17	2	3	3	0	0	0
Carol Brady	2	0	0	4	6	10	8	2	2	1	0	0	0
Michael Fox	1	8	3	21	13	34	24	25	10	33	0	0	1
Betty Boop	1	0	0	0	11	11	6	3	5	1	0	0	0
<b>TOTAL:</b>	<b>5</b>	<b>17</b>	<b>10</b>	<b>82</b>	<b>48</b>	<b>130</b>	<b>104</b>	<b>82</b>	<b>26</b>	<b>60</b>	<b>1</b>	<b>0</b>	<b>3</b>

**Comparison to Industry Averages (Monthly Stats are for February)**

	Average Calls Per Week (Standard: 40 per week)		Average Appts/Visits Per Week (Standard: 4-5 per week)		Call Outs that turn to Appts/Visits (Standard: 8.5%)		New Leads that turn to Initial Appts/Visits (Standard: 18%)		Meetings that turn to Deposits (Standard: 14%)	
	MTD	YTD	MTD	YTD	MTD	YTD	MTD	YTD	MTD	YTD
Minnie Mouse	65.00	32.23	5.20	5.23	21%	22%	7%	17%	6%	6%
Fred Flinstone	8.00	11.67	1.75	2.63	no appts	0%	no initial appts	no appts	no appts	no sales
Carol Brady	36.00	42.00	3.20	6.23	13%	41%	21%	21%	8%	2%
Michael Fox	32.00	65.00	11.20	2.30	36%	23%	14%	23%	5%	4%

\* Year-to-date information is based on data through date of last reports, not through the selected month

**Timing of Next Activity with Active Leads**

	Overdue	In Future	None Scheduled	Total
Minnie Mouse	997	182	207	1386
Fred Flinstone	787	467	490	1744
Carol Brady	1130	31	3138	4299
Michael Fox	4038	840	4001	8879
<b>TOTAL:</b>	<b>6952</b>	<b>1520</b>	<b>7836</b>	<b>16308</b>

**A typical counselor in a CCRC...**

Makes 22 outgoing calls per week
Holds 4 lead meetings per week
Gets 32% of new leads to come in for an appt
Converts 5% of new leads to move in
Nets an average of 12 sales per year



**COMMUNITY NAME**  
**2015 LEAD ANALYSIS**  
 Data for Week Ending: February 8, 2015

**Leads and Sales for the Week Ending 2/8/15**

**YTD Leads and Sales**

**Status Codes**

	New Leads	Re-Inquiries	Deposits*	Cancellations	Move Ins	New Leads	Re-Inquiries	Deposits*	Cancellations	Move Ins
Advertising/Media	12				1	201	52	1		4
Direct Mail	6	12				78	125	7	4	2
Internet	14	11				69	8	9		1
PR/Networking/Outreach							23		1	
Referrals	7		2			305		10		5
Reputation	3					120	1	5	3	23
Telemarketing	1							3		1
Unknown							12			
<b>TOTAL:</b>	<b>43</b>	<b>23</b>	<b>2</b>	<b>0</b>	<b>1</b>	<b>773</b>	<b>221</b>	<b>35</b>	<b>8</b>	<b>36</b>

\* Sources for deposits refer to the original source, not any subsequent re-inquiries

Code	Description	Lead Count	% of Database	Leads added in the last 60 days
0	No Counselor Contact Yet	32	0.4%	8
SDEP-\$1k	SDepositor - \$1k	3	0.0%	1
SDEP-10%	SDepositor - 10%	8	0.1%	2
1. Hot	Hot Lead	3	0.0%	1
2. Warm	Warm Lead	14	0.2%	0
3. Cool	Cool Lead	196	2.4%	79
4. Future	Future Lead	695	8.4%	0
LL - Medical	Lost Lead: Medical Reasons	1,241	14.9%	5
LL - Care Level	Lost Lead: Care Level N/A	38	0.5%	12
LL - Competitor	Lost Lead: Competitor	62	0.7%	5
LL - Deceased	Lost Lead: Deceased	1	0.0%	12
LL - DUPE	Duplicate Record - do not use	351	4.2%	17
LL - Financial	Lost Lead: Financial Reasons	502	6.0%	6
LL - Moved	Lost Lead: Moved From Area	423	5.1%	7
LL - Other	Lost Lead: Other	1,254	15.1%	69
LL - No Contact	Lost Lead: Requested no further contact	231	2.8%	0
MO - Competitor	Move-out-Competitor	7	0.1%	0
MO - Deceased	Move-out: Deceased	258	3.1%	3
MO - Financial	Move-out: Financial Reasons	31	0.4%	0
MO - Medical	Move-out: Medical Reasons	263	3.2%	0
MO - Moved	Move-out: Moved From Area	248	3.0%	0
MO - Other	Move-out: Other	4	0.0%	0
MO - SNF	Move-Out: to Skilled Nursing	695	8.4%	1
RES-EL	Resident - Assisted Living	1,364	16.4%	4
RES-IL	Resident - Independent	16	0.2%	0
RES-SN	Resident - Skilled Nursing	376	4.5%	5
<b>Total:</b>		<b>8316</b>	<b>100%</b>	<b>237</b>

Top New Lead Producers - 2015	
1. ADV-MAG-2014AUG-Glob	185
2. ADV-NP-2014NOV-FR	150
3. ADV-NP-2015SEP-JA	89
4. ADV-RAD-WTIC-morning	78
5. DM-2010MAR-WCC	76
6. REF-FAM	70
7. REF-PRO	63
8. REF-REAL	43
9. REF-RES	19
10. REF-RESLAW	16

**Status Code Summary**

Active Leads	943
Lost Leads	5378
10% Depositor	8
Resident	1756
<b>Total Leads</b>	<b>9,752</b>



COMMUNITY NAME  
INVENTORY STATUS BY RESIDENCE TYPE

Data for Week Ending: February 8, 2015

Building 1			Reserved				Available				
			With \$1,000 deposit	With 10% deposit	Financially Occupied	Total Occupied & Reserved	Show Ready	Customizable	Under Construction	Total Available	
	Total	Sq. Ft									
<b>Studios</b>	Style 1	11	700	1		5	6	1	3	1	5
	Style 2	10	750		2	1	3	3	1	3	7
	Style 3	12	800	2	5	3	10	1	1		2
	Style 4	13	810		1	7	8	3	2		5
	<b>Subtotal:</b>	<b>46</b>		<b>3</b>	<b>8</b>	<b>16</b>	<b>27</b>	<b>8</b>	<b>7</b>	<b>4</b>	<b>19</b>
<b>One Bedroom</b>	Style 1	17	950		2	12	14	1	2		3
	Style 2	40	1000	2	1	30	33	1	2	4	7
	Style 3	1	1130			1	1				0
	Style 4	22	1300		1	15	16	4	1	1	6
	<b>Subtotal:</b>	<b>80</b>		<b>2</b>	<b>4</b>	<b>58</b>	<b>64</b>	<b>6</b>	<b>5</b>	<b>5</b>	<b>16</b>
<b>Two Bedroom</b>	Style 1	6	1500	1		3	4	1	1		2
	Style 2	9	1600	1	2	6	9		1	-1	0
	Style 3	6	2110		1	5	6				0
	<b>Subtotal:</b>	<b>21</b>		<b>2</b>	<b>3</b>	<b>14</b>	<b>19</b>	<b>1</b>	<b>2</b>	<b>-1</b>	<b>2</b>
<b>Cottages</b>	Style 1	1	1724			1	1				0
	Style 2	5	1789	1	2	2	5				0
	Style 3	7	2133			6	6	1			1
	Style 4	2	2500			2	2			1	1
	<b>Subtotal:</b>	<b>15</b>		<b>1</b>	<b>2</b>	<b>11</b>	<b>14</b>	<b>1</b>		<b>1</b>	<b>2</b>
<b>Total:</b>		<b>162</b>		<b>8</b>	<b>17</b>	<b>99</b>	<b>124</b>	<b>16</b>	<b>14</b>	<b>9</b>	<b>39</b>

