
DEALERSHIP MARKETING FLOW

Definition

A step-by-step operational roadmap used by internal teams to build awareness, engage interest, and guide qualified leads toward a signed agreement and successful territory launch.

Focus Areas Include:

- Emotional messaging and storytelling
- Grassroots visibility and lead capture
- Qualification through email drips, videos, and FAQs
- 1:1 consults, territory review, and agreement signing
- CRM tracking, follow-up scheduling, onboarding readiness

Purpose

To guide internal staff and coordinators in managing lead communications, segmentation, and conversion checkpoints in a repeatable, human-centered process.

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1. Market Visibility & Emotional Awareness

Goal: Attract mission-aligned individuals by introducing the heart behind the opportunity.

At Aging In The Comfort Of Home®, visibility begins with intention. We don't market a franchise—we invite people into a movement. Through heartfelt storytelling, grassroots visibility, and value-first content, we connect with individuals who care deeply about aging with dignity and want to create purpose-driven businesses in their communities.

We begin with empathy, story, and a visible promise to help families stay where they belong—at home.

Focus: Create awareness through emotionally resonant, human-first content.

Tactics:

- **Social Media (FB, IG, LinkedIn):** Mission-driven posts, testimonials, quote cards, and safety visuals
- **Local SEO:** Google Business profile optimization with emotional imagery, Q&A, and service highlights
- **Email Nurture Sequence:** 5-part flow including the brand story, dealer impact, FAQs, and a gentle invitation to connect
- **Lead Magnet:** Downloadable checklist: *"Top 20 Signs a Home Isn't Aging-Ready"*
- **Visual Tools:** Branded templates, Canva assets, shareable video snippets

Tools:

- **Canva:** Design emotional quote cards and social templates
- **Meta Business Suite:** Schedule and monitor Facebook & Instagram content
- **AWeber:** Create nurture email flows with soft CTA delivery
- **Webflow CMS:** Build lead-gen landing pages and story-rich blog content
- **Google Business Manager:** Enhance local visibility and Q&A features

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2. Engage with Empathy

Goal: Deepen the emotional connection and help leads imagine themselves in this work.

Once interest is piqued, we aim to meet people where they are—with story, sincerity, and support. This stage is about humanizing the mission: showing real people doing meaningful work and offering accessible tools that help leads see themselves stepping into purpose.

We don't push. We share. We invite.

Focus: Build trust and resonance through visual storytelling and mission-first materials.

Tactics:

- **Founder/Dealer Intro Video:** “Why I Chose This Work” (Loom-style or voiceover short-form)
- **Lead Magnet:** “Top 10 Signs a Home Isn’t Aging-Ready” checklist
- **Visual FAQ Sheet:** Co-branded and designed in warm mint/linen tones
- **Call-to-Action:** “Let’s talk about how you can help families in your own community age safely, with dignity.”

Tools:

- **Loom:** Record and share short emotional videos
- **Canva:** Design branded lead magnets and FAQ visuals
- **Webflow CMS:** Host and track lead magnet downloads

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3. Convert Through Conversation

Goal: Move leads from interest to action through values-driven, one-on-one connection.

At this stage, we shift from visibility and education to meaningful interaction. It's not about pushing a pitch—it's about listening, affirming purpose, and guiding the next steps. Every conversation is an opportunity to deepen trust, answer real questions, and help someone envision what legacy-building looks like in their community.

We lead with empathy and close with clarity.

Focus: Use one-on-one conversations to confirm alignment, explain the opportunity, and invite commitment.

Process:

- **Soft Consults:** Begin with shared values and a warm, personal tone—ask about their "why"
- **Review Opportunity:** Walk through the mission, impact, and practical support
- **Answer Questions:** Use the Dealer Overview Packet and flyers as reference points

- **Extend Invitation:** If aligned, invite them to take the next step toward the application

Assets to Send Before or After Call:

- **Dealer Overview Packet (PDF)**
- **Print or Digital Flyer**
- **Optional Demo Video** (short, emotional, voiceover-driven)

Tools:

- **Calendly:** Allow prospects to self-schedule 1:1 discovery calls
- **Zoom:** Host meaningful video conversations that focus on trust, not pressure
- **CRM (Zoho or HubSpot):** Track call notes, tag by engagement status, and coordinate follow-up
- **Canva:** Use visual slides or personalized follow-up PDFs as leave-behind materials

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4. Secure Commitment with Confidence

When someone is ready to take the next step, we ensure the process is respectful, pressure-free, and easy to understand. This isn't just a transaction—it's the beginning of a purposeful partnership. We communicate every detail, honor their questions, and offer steady guidance so they feel confident in their decision.

Focus: Transparent breakdown of opportunity and agreement readiness.

Steps:

- **Encourage Interest Form Submission:** Direct the lead to a branded form (via Tally.so or Webflow)
- **Provide Transparent Info:**
  - Startup cost and any financing options
  - Training timeline and onboarding expectations
  - Ongoing support and dealer community access
- **Offer Social Proof:** Share testimonials or short stories from dealers with similar backgrounds (e.g., veterans, caregivers, career-changers)
- **Confirm Fit:** Use follow-up calls or emails to reinforce alignment—not pressure

Tools:

- **Tally.so or Webflow Forms:** Collect contact info, motivation, and regional interest
- **Airtable:** Track lead progress, internal feedback, and form submissions
- **Zoho or HubSpot CRM:** Tag leads based on readiness and trigger onboarding preparation
- **AWeber or Mailchimp:** Send confirmation emails and readiness resources with a welcoming tone

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5. Launch with Legacy in Mind

Goal: Ensure new dealers begin with confidence, clarity, and community—knowing they're not in this alone.

The first day of business should be the first step in something meaningful. As new dealers officially join, we surround them with the tools, mentorship, and momentum they need to succeed early. From branded launch-day assets to onboarding content and peer support, we reinforce that this isn't just about starting a company—it's about stepping into a mission.

We don't just hand over materials—we stay beside them as they build.

Focus: Deliver structured onboarding, launch support, and an ongoing sense of purpose-driven belonging.

Support Includes:

- **Branded Launch Templates:** Social media assets and graphics for a confident debut
- **30-Day Onboarding Flow:** Self-paced modules delivered via LMS
- **Weekly 1:1 Check-Ins:** Personalized support from HQ to address early questions
- **Dealer Slack Group:** Real-time connection, idea-sharing, and encouragement
- **Private Resource Library:** Access to templates, seasonal campaigns, and referral tools

Key Message to Dealer: *“You’re not just opening a business. You’re becoming a trusted voice for families who need you.”*

Tools:

- **Zoom or Google Meet:** Host weekly support calls and strategy check-ins
- **Webflow LMS:** Deliver onboarding modules in an accessible, self-paced format
- **Airtable or Google Drive:** Share launch assets, toolkits, and campaign materials