
DEALERSHIP SALES FLOW

Definition:

This strategic communication and attraction framework outlines how Aging In The Comfort Of Home® builds brand awareness, engages potential dealers, and initiates early interest without relying on high-budget advertising.

Focus Areas Include:

- Emotional messaging and storytelling
- Organic social media and email campaigns
- Grassroots lead generation (e.g., community posts, checklists, Facebook Groups)
- Relationship-building before the sales process begins

Purpose:

To inspire trust, spark curiosity, and attract values-aligned leads by sharing the *why* of the mission.

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1. Lead Capture & Readiness Intake

Goal: Convert emotionally engaged leads into qualified prospects through clear, intentional entry points.

This first step transforms visibility into traction. After encountering the mission through thoughtful marketing, prospective dealers are invited on a discovery path that feels both professional and personal. The experience is designed for clarity—easy to access, simple to understand, and grounded in credibility.

Focus: Capture mission-aligned leads through strategic visibility, trust-building content, and thoughtful intake tools.

Tactics:

Google Business Optimization

- **Add Q&A and Products/Services Tabs:** Highlight FAQs and offerings like "Home Safety Evaluations" or "Alzheimer's Modifications."
- **Collect & Showcase Reviews Early:** Ask satisfied clients or partners to leave reviews to build trust quickly.
- **Add branded imagery:** Include your logo, client projects, or consultation snapshots to make the profile feel professional.

Tools:

- **Google Business Profile Manager**
  Purpose: Manage your local business presence across Google Search and Maps
  Use Case: Add services, post updates, answer FAQs, and collect reviews to establish local credibility and trust
- **Adobe Creative Cloud or Canva**
  Purpose: Create polished, branded visuals to showcase your services and elevate your Google listing
  Use Case: Design profile banners, service images, quote cards, or before-and-after examples to feature in your photo gallery
- **Google Photos**
  Purpose: Store, organize, and easily upload images for your Google Business profile
  Use Case: Upload job site photos, event snapshots, or client testimonials directly to your Google listing from any device

Organic SEO

- **Create Blog Posts & FAQs:** Write content around high-intent search terms like *"start a senior care business"* or *"aging in place franchise alternative."*
- **Share Stories & Solutions:** Generate examples of client impact, dealer experiences, or aging-in-place success stories.
- **Update Consistently:** Aim to publish new content monthly and refresh existing pages to improve performance and keep your messaging timely.

  Tools:

- **Webflow CMS**
  Purpose: Build and manage a search-optimized website with structured content and blog functionality
  Use Case: Create and update blog posts, FAQs, and landing pages focused on high-intent keywords for senior care and dealer opportunities
- **Ubersuggest**
  Purpose: Discover keyword opportunities and content ideas aligned with your audience's search behavior
  Use Case: Identify long-tail keywords like "aging in place franchise alternative" and assess difficulty, volume, and ranking potential
- **Google Search Console**
  Purpose: Track how your website performs in search results and optimize your content accordingly
  Use Case: Monitor keyword rankings, clicks, and indexing status for blog posts and landing pages to improve SEO performance

Email Drip Campaigns

- **Automate Nurture Sequences:** Trigger email flows from landing page signups or re-engage past leads who've expressed interest.
- **Educate with Heart:** Share your story, the mission behind the brand, and what makes this opportunity different—layer in testimonials, FAQs, and success milestones.
- **Guide with Purpose:** Each email should lead naturally to the next step—downloading the Dealer Packet, booking a consult, or simply replying with a question.

Tools:

- **AWeber or Mailchimp**

Purpose: Design and automate emotionally resonant email campaigns that nurture dealer interest
Use Case: Create multi-part email flows triggered by form submissions, sharing your story, testimonials, FAQs, and next-step CTAs

- **Webflow or Airtable Forms**
  Purpose: Capture lead information from landing pages, interest forms, or downloadable resources
  Use Case: Embed forms to collect name, location, contact details, and mission alignment responses that trigger automated sequences
- **HubSpot or Zoho CRM**
  Purpose: Track communication history, segment leads, and monitor email engagement metrics
  Use Case: Score leads based on email opens and clicks, assign follow-ups, and manage ongoing communications with personal touches

<u>**Social Media Organic Posting**</u>

- **Share Branded Content Daily:** Post consistently to Meta (Facebook + Instagram) and LinkedIn.
- **Inspire & Inform:** Rotate content types, including testimonials, FAQ highlights, behind-the-scenes moments, and short video walkthroughs that showcase real-life impact.
- **Engage Locally:** Share posts in neighborhood Facebook Groups, local business pages, and senior-focused forums to build authentic community visibility at zero cost.

Tools:

- **Adobe Creative Suite or Canva**
  Purpose: Design branded social visuals and story-driven content that reflects the AITCOH mission
  Use Case: Create quote graphics, before-and-after visuals, testimonials, and campaign-specific social tiles
- **Meta Business Suite**
  Purpose: Schedule, post, and monitor content across Facebook and Instagram from one central dashboard
  Use Case: Plan daily content, review performance, and manage messages and comments from one place
- **Buffer or Later**

Purpose: Schedule and manage content publishing to LinkedIn (and optionally other platforms)
Use Case: Queue educational posts, repurpose testimonials, and time outreach to local community conversations

Local Networking & Referrals

- **Show Up at Local Events:** Attend low-cost or free community gatherings—like senior expos, chamber mixers, caregiver forums, and veterans' organization meetups—to connect face-to-face with values-aligned audiences.
- **Build Trusted Partnerships:** Develop referral relationships with occupational and physical therapists, senior centers, pharmacists, and home health aides who already serve your future clients.
- **Lead with Value:** Offer thoughtful resources like home safety checklists, educational flyers, or volunteer guest talks—position as a guide, not just a business.

Tools:

- **Eventbrite or Meetup**
  Purpose: Discover and register for relevant local events, expos, and community gatherings
  Use Case: Identify opportunities to attend or sponsor events where seniors, caregivers, and local service providers are already engaged
- **Adobe Creative Suite or Canva**
  Purpose: Design educational handouts, leave-behinds, and branded materials to bring to events and partner meetings
  Use Case: Create safety checklists, dealer service flyers, and co-branded outreach assets that reinforce your expertise and mission
- **Google Calendar**
  Purpose: Schedule and track follow-ups with event attendees and referral partners
  Use Case: Set reminders to reconnect, share collateral, or book coffee chats with potential allies in your local ecosystem

Lead Nurturing Assets

- **Print-Friendly Leave-Behinds:** Branded one-pagers or mini brochures for expos, senior centers, or healthcare providers.

- **Business Card with CTA:** Include a QR code leading to the landing page or interest form.
- **Downloadable Checklist:** "Top 10 Signs a Home Isn't Aging-Ready"—great for value-first outreach.

Tools:

- **Adobe Creative Suite or Canva**
  Purpose: Design branded print and digital assets for events, referrals, and value-first education
  Use Case: Create flyers, one-pagers, postcards, and dealer intro sheets aligned with AITCOH brand visuals
- **QR Code Generator**
  Purpose: Generate scannable codes to drive offline leads directly to your digital assets
  Use Case: Add QR codes to business cards, brochures, or expo banners that link to the interest form or landing page

<u>**Google Ads**</u>

- **Focus on High-Intent Search Terms:** Run text-based ads targeting phrases like *"how to start a senior care business,"* *"aging in place dealership,"* or *"accessible home modification opportunities."* These keywords attract people already looking for mission-aligned work.
- **Set a Modest Budget:** Start small—$5–$10/day—with tight geographic and keyword targeting to avoid waste and test effectiveness before scaling.
- **Link to Value, Not Just Sales:** Direct ads to a compelling landing page offering a free resource, like a downloadable dealer guide or explainer video—build trust first, then invite deeper engagement.

Tools:

- **Google Ads Manager**
  Purpose: The central platform for creating, launching, and managing Google Search ad campaigns
  Use Case: Target high-intent keywords, monitor cost-per-click, and optimize ad performance by region and query
- **Google Keyword Planner**
  Purpose: Research and validate keyword opportunities for your target audience

Use Case: Identify top-performing phrases like "start a senior care business" and estimate search volume and competition

- **Webflow (for Landing Pages)**
  Purpose: Design and A/B test high-converting landing pages that support your ad campaigns
  Use Case: Deliver emotionally compelling, value-first landing experiences tied to each ad campaign (e.g., packet download, consult form)

<u>Meta Ads</u>

- **Target Purpose-Driven Audiences:** Use Meta's detailed interest targeting to reach aspiring entrepreneurs, veterans, caregivers, retired professionals, and home service providers who align with your mission.
- **Tell a Human Story:** Run ads that spotlight real dealer journeys, emotional testimonials, or the question families ask: *"How can I help Mom stay in the home she loves?"*
- **Start with a Test Budget:** Begin with $5–$15/day and test 2–3 creative messages. Optimize for leads or page views, and let the best-performing ad guide your spending.

Tools:

- **Meta Ads Manager**
  Purpose: The official dashboard for creating, targeting, and managing Meta ad campaigns (Facebook + Instagram)
  Use Case: Set detailed audience filters, control budget, monitor performance, and optimize ad delivery
- **Adobe Creative Suite or Canva**
  Purpose: Design visually engaging, brand-aligned ad creatives for both image and video formats
  Use Case: Create carousel ads, emotional quote graphics, and mobile-friendly video snippets for Reels or Stories
- **Facebook Creative Hub**
  Purpose: Preview, prototype, and share ad mockups before launching them live
  Use Case: Collaborate with your internal or creative team to review visual ads across devices and placements

<u>LinkedIn Ads</u>

- **Reach Career-Changers & Community Builders:** Use LinkedIn's job title, industry, and interest filters to target professionals in healthcare, construction, education, and nonprofit sectors who are exploring meaningful second careers.
- **Speak to the Mission:** Frame your ads around purpose, impact, and autonomy. Messaging like *"Build a business that helps families age with dignity"* resonates deeply in a professional setting.
- **Use Sponsored Content or Lead Gen Forms:** Share heartfelt success stories, program highlights, or a dealer spotlight post. LinkedIn's built-in lead forms make it easy to capture interest without sending users off-platform.
- **Start Narrow & Test:** Begin with a $10–$20/day budget focused on one region or audience segment. Track engagement and adapt your messaging to what moves people most.

Tools:

- **LinkedIn Campaign Manager**
  Purpose: The official platform to create, manage, and monitor LinkedIn ad campaigns
  Use Case: Set audience filters (job titles, industries, seniority), control budget, launch Lead Gen Forms
- **Canva or Adobe Creative Cloud**
  Purpose: Design visually compelling ad graphics and branded templates
  Use Case: Create testimonials, quote cards, and image-driven ads aligned with the AITCOH brand palette
- **Google Sheets or Airtable**
  Purpose: Track testing variables, ad engagement data, and performance by audience segment
  Use Case: Measure which industries or titles generate the best clickthrough and lead conversion.
- **LinkedIn Lead Gen Forms**
  Purpose: Collect leads natively on LinkedIn without directing users off-platform
  Use Case: Capture key contact info from career changers or service-minded professionals interested in the opportunity
- **HubSpot or Zoho CRM**
  Purpose: Manage leads, automate follow-ups, and track pipeline movement
  Use Case: Sync leads captured via LinkedIn into your CRM, trigger a thank-you email, and assign for follow-up

2. Initial Qualification & Education

Goal: Help people move from curiosity to clarity by offering thoughtful education and soft-touch qualifications.

Now that interest is captured, it's time to deepen understanding. This phase introduces the opportunity in a way that informs without overwhelming. We deliver content that answers questions before they're asked—while carefully observing who's leaning in and who's ready to learn more.

Focus: Support the discovery process through emotionally grounded education and CRM-tracked behavior cues.

Process:

- **Trigger an Email Nurture Sequence:** Once a lead opts in, they receive an automated sequence of branded, emotionally grounded emails that tell the story of Aging In The Comfort Of Home®, explain the dealer model, and share meaningful benefits.
- **Deliver a Human-Centered Orientation:** Provide access to an optional recorded webinar or short introductory video that walks through the mission, expectations, and dealer experience. This helps prospects feel seen, heard, and supported before ever speaking with someone live.
- **Share a Visual FAQ Sheet:** Send a simple but thoughtful FAQ one-pager that answers common early-stage questions, such as startup costs, training timelines, what's included, and how they'll be supported.
- **Tag & Track Engagement:** Use CRM tools to identify your warmest leads based on who opens emails, clicks to deeper content, watches videos, or books a consultation. These behaviors inform the next steps in your funnel.

Tools:

- **Calendly**
  Purpose: Automate appointment scheduling for consults, intro calls, or group sessions
  Use Case: Allow leads to self-schedule 1:1 consultations or onboarding meetings directly from emails or landing pages
- **Zoho or HubSpot CRM**

Purpose: Track and score lead activity to identify engagement patterns and next-step readiness
Use Case: Tag leads who open emails, click videos, or download assets and assign them for follow-up based on behavior

- **Zoom or Loom**
  Purpose: Deliver personal, human-centered video messages to guide early engagement
  Use Case: Record and share a founder welcome video, short walkthrough, or consult invitation to help prospects feel personally seen

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3. Personal Consultation

Goal: Build trust through one-on-one conversations that prioritize connection, not conversion.

Every consult is a chance to have a meaningful conversation. These aren't presentations; they're dialogues rooted in shared values. By listening first and leading purposefully, we uncover alignment and open the door to partnership.

Focus: Use 1:1 consults to explore fit, affirm purpose, and walk through the opportunity with care.

Process:

- **Host a One-on-One Consultation:** Schedule a Zoom or phone call focusing on connection first and conversion second. Listen to their "why" and affirm their purpose.
- **Walk Through the Vision & Support:** Share the story behind Aging In The Comfort Of Home®, the values that anchor the brand, and the real-world responsibilities of a dealer.
- **Make It Relatable:** Use testimonials, day-in-the-life dealer stories, and simple case studies to depict what this work looks and feels like.
- **Discuss Logistics with Care:** Gently walk through territory options, training timelines, and startup investment—always tied to the impact they'll be making.

Assets:

- **Dealer Overview Packet (PDF):** The core companion guide for the conversation.
- **Printed Flyer:** A tangible, leave-behind piece or a mailed version for remote prospects.
- **Optional Demo Video:** For visual learners—short, emotionally grounded walkthroughs of services or success stories.

Tools:

- **Zoho or HubSpot CRM**
  Purpose: Track prospect submissions, consultation notes, and deal stage progression
  Use Case: Tag leads as "verbal interest," "pending review," or "ready for agreement" to guide the next steps and follow-up communication
- **AWeber or Mailchimp**
  Purpose: Automate and personalize communication pre- and post-consultation
  Use Case: Send confirmation emails, recap the consult conversation, and deliver emotional assets like dealer videos and testimonial stories
- **Calendly**
  Purpose: Let prospects schedule their initial or follow-up consult with ease
  Use Case: Embed booking links into email follow-ups or interest forms, offering flexibility and reducing scheduling friction
- **Airtable or Google Sheets**
  Purpose: Coordinate internal collaboration and review during the qualification process
  Use Case: Track region availability, internal notes, and territory strategy while aligning multiple team members around each lead

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4. Soft Commitment & Application Phase

Goal: Confirm alignment and collect deeper insights through a guided, values-based application process.

This phase intentionally guides the process. Once mutual interest is established, we invite prospects to share more about their background, community, and motivation. The goal is clarity on both sides before moving forward.

Focus: Invite commitment through a thoughtful application process emphasizing shared values and realistic expectations.

Process:

- **Complete the Interest Form:** The prospective dealer fills out a simple application form—sharing their motivation, background, and the community they want to serve.
- **Internal Review:** The AITCOH team reviews the submission, evaluates market viability, and assesses alignment based on values, goals, and territory availability.
- **Optional Follow-Up Consultation:** If needed, a second personal call can be scheduled to answer detailed questions, clarify expectations, and further affirm mutual fit before the formal agreement.

Tools:

- **Tally.so or Typeform**
  Purpose: Create user-friendly, mobile-optimized interest or application forms
  Use Case: Collect motivation, background, and regional interest from prospects while maintaining brand tone and visual consistency
- **Zoho or HubSpot CRM**
  Purpose: Tag and track form submissions, assign internal reviewers, and monitor application status
  Use Case: Categorize leads as "Under Review," "Territory Viable," or "Needs Follow-Up," ensuring smooth handoff to coordinators
- **AWeber or Mailchimp**
  Purpose: Send confirmation emails, next-step guides, and tailored updates to applicants
  Use Case: Deliver warm, branded emails to reinforce momentum after form submission and introduce what to expect next
- **Airtable or Google Sheets**
  Purpose: Log internal review notes, flag follow-ups, and track decision status across team members
  Use Case: Maintain centralized visibility on application progress, region overlap, or disqualification notes during vetting

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5. Negotiation & Agreement

Goal: Finalize the partnership with clarity, transparency, and confidence—laying the foundation for a long-term relationship.

This is where intention becomes action. Agreements are reviewed side-by-side, not across the table. Every detail is addressed respectfully, and the process reinforces a core message: we're building something important together.

Focus: Walk through terms transparently and confirm mutual readiness to launch.

Process:

- **Territory Confirmation:** Collaborate with the prospective dealer to confirm their geographic focus and assign a territory strategy based on market potential.
- **Outline Startup & Support:** Communicate the initial investment breakdown, training timeline, onboarding expectations, and available support systems.
- **Review & Sign Dealer Agreement:** Carefully walk through the agreement, answer any remaining questions, and guide the dealer through signing the documentation.
- **Secure Deposit or Payment:** Collect the initial deposit or full startup investment to confirm commitment and activate onboarding.

Tools:

- **DocuSign or PandaDoc**
  Purpose: Send and manage digital agreements with secure, legally binding e-signatures
  Use Case: Share the dealership agreement with prospective partners, walk through the terms, and complete signatures without friction
- **Stripe, PayPal Business, or QuickBooks**
  Purpose: Collect secure startup deposits or full payments during the final commitment
  Use Case: Enable flexible payment options for incoming dealers with clear receipts and accounting transparency
- **Airtable or Google Sheets**
  Purpose: Track agreement status, payment confirmation, and onboarding readiness
  Use Case: Mark agreements as "Sent," "Signed," or "Funded," and coordinate onboarding preparation across departments
- **Zoho or HubSpot CRM**
  Purpose: Update lead status, trigger onboarding workflows, and transition contact to dealer record
  Use Case: Move qualified leads into the "Active Dealer" pipeline and initiate welcome sequences or LMS access

6. Onboarding & Training

Goal: Empower new dealers with the tools, confidence, and community support needed to launch successfully and serve purposefully.

Training isn't just about information—it's about instilling confidence. This phase gives dealers a clear roadmap, brand-aligned tools, and early wins. The foundation is education, but the real focus is preparation.

Focus: Deliver comprehensive onboarding content and mentorship that equips dealers to begin client consultations and community outreach.

Includes:

- **Product & Service Training:** In-depth education on our signature offerings—from stair lifts and ADA-compliant remodeling to smart GPS trackers, grab bars, and memory care aids.
- **Customer Experience & Consultation Walkthroughs:** Step-by-step guidance on conducting safety evaluations, navigating family dynamics, and recommending solutions with compassion and confidence.
- **Local Outreach Playbook:** A practical guide to forming referral partnerships, connecting with senior centers and veteran organizations, and initiating community trust through free evaluations and co-branded support.
- **Marketing Toolkit:** Access to branded assets, including social media templates, flyers, web banners, promotional scripts, and optional launch-day campaigns.

Tools:

- **DocuSign or PandaDoc**
  Purpose: Send and manage digital agreements with secure, legally binding e-signatures
  Use Case: Share the dealership agreement with prospective partners, walk through the terms, and complete signatures without friction
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7. Activation & Local Launch

Goal: Support dealers as they take their first steps in the field—ensuring they feel confident, connected, and never alone.

The dealership is live—and our job is to fuel momentum. We provide launch-day assets, community integration support, and peer encouragement to help dealers step into their role as a trusted resource. This is where the work becomes real—and rewarding.

Focus: Guide new dealers into their local market with encouragement, campaign support, and ongoing relationship-building.

Support:

- **Ongoing Mentorship & Territory Coaching:** Continuous guidance from the AITCOH team to help navigate early outreach, installation strategies, and customer interactions.
- **Monthly 1:1 Check-Ins:** Dedicated time to assess progress, answer questions, and provide strategic feedback tailored to the dealer's growth stage.
- **Fresh Marketing Assets:** Regularly updated templates, seasonal promotions, and local campaign ideas to support visibility and brand consistency.
- **Dealer-Only Newsletter & Slack Group:** A private support network for sharing wins, asking questions, learning from peers, and staying updated with brand innovations.

Tools:

- **Slack or Discord**
  Purpose: Enable real-time communication, updates, and peer support across the dealer network
  Use Case: Share early wins, ask questions, troubleshoot issues, and stay connected with HQ and fellow dealers
- **Airtable or Google Drive**
  Purpose: Organize and distribute marketing assets, playbooks, and dealer feedback loops
  Use Case: Provide quick access to seasonal campaigns, referral scripts, and branded templates—all in one place
- **Zoom or Google Meet**
  Purpose: Host structured 1:1 mentorship check-ins and group coaching calls
  Use Case: Review territory performance, discuss growth strategies, and provide accountability in a supportive space
- **AWeber or Mailchimp**
  Purpose: Send dealer-only newsletters and important updates across the network
  Use Case: Share new assets, program changes, story spotlights, and ongoing encouragement directly to dealer inboxes