

Think best practices and practical tips, starting with a short list of “don’ts.” These are everyday examples that show how small tweaks can lead to much better outcomes. No finger-pointing—just helpful reminders to keep us sharp and successful.

🚫 Don't #1:

Don't send an email with attached activities list stating: “Attached is our list of activities. Please take a look at let me know if there's anything you might be interested in and possibly taking a tour.”

Instead, customize an email with an invitation to a specific event attached with lunch and explain the benefit to the prospect: “Enjoy a delicious meal prepared by our chef while learning a little more about our lifestyle. A great way for your mom to take baby steps into learning more.”

🚫 Don't #2:

Don't schedule a next activity: “follow up to see if interested”. Example: “11/1 Tour for MC, husband still active, golfing every day, wife wants a plan. Next scheduled activity 12/1 call to see if still interested.”

Understand the journey and meet the prospect where they are. What is the next step? In this case, there should be a nurture cadence established, not a follow up call to see if they’re interested.

🚫 Don't #3:

Don't apologize for “bothering” them or state, “I hope I’m not bothering you.”

This shows a lack of confidence and creates distrust. Instead approach the call with confidence, a statement of fact and an open-ended question. If you are hesitant to pick up the phone, re-assess. Practice with a coworker until you feel comfortable.

🚫 Don't #4:

Don't use the words, “I was following up...”

That sounds like you’re checking them off the list. Instead, replace with, “I was thinking about you and wondering how things are going with XX”.

These examples aren’t about criticism—they’re about awareness and improvement. More tips (and the “do’s”) to follow.

Thank you for your continued commitment to thoughtful, effective sales practices.