Right Care.  
Right Time.  
Right People.  

Introducing the  
Personal Service System  
by Brookdale  

A Medical Professional Referral  
Lead Generation Campaign  

Bringing New Life to Senior Living™  
brookdale.com
Hello, Brookdale Family,

As our top-converting outside lead source, medical professionals are crucial for our business. It is essential that you participate in our July campaign to generate more referrals from this important source. This initiative, called “Right Time, Right Care, Right People,” will educate medical professionals on our Personal Service System, a vital differentiator for Brookdale and those we serve.

Our Personal Service System enables staff to identify the precise services residents need, with the frequency and amount of help that is appropriate. If their needs and wants increase or decrease, we change their customized care plan. We are able to offer the Personalized Service System because we conduct a uniquely detailed assessment process as well as ongoing reassessments to ensure care plans match what residents require.

Thanks to our Personal Service System, medical professionals can have confidence their patients are receiving top-quality care tailored to their patients’ unique needs. What’s more, the customer’s journey begins with a free assessment, so our process gets underway at absolutely no charge.

The focused marketing campaigns our communities have been executing this year have quickly proven to build business. Please commit to executing “Right Time, Right Care, Right People.” to educate medical professionals in your area about our Personal Service System and increase leads and move-ins.

Thank you for your hard work and support!

Personally,

The Brookdale Marketing Team

* Collateral for promoting the Personal Service System is available on BrandWorks.
  * Community login (first time login, create profile page/password)
    — Username: BU# (numbers only)
    — Password: welcome (all lowercase)
  * For Regional or DDS login assistance, contact your Account Executive.
    — BrandWorks HELPLINE - Contact: Brookdale@rjyoung.com or 1-844-296-8013 (8 a.m. to 5 p.m. CST)
Purpose:
• Increase referrals from medical professional referral sources — excluding paid referrals — in your local area to generate leads since these referrals are among our top-converting leads

How:
• This toolkit gives you the resources you need to educate your medical professional referral sources about what makes Brookdale better and different than the competition: our Personal Service System.

Identifying medical professionals to visit:
• Select your top 10, highest volume medical referral sources (Gold and Silver status in SMS) or those you have selected as Professional Target Organizations.

What to do to prepare:
• Call your medical professional referral sources and/or Professional Target Organizations.
• Plan to visit each medical professional referral source for the next four weeks. If you can get additional visits, that's even better.
• Customize the Personal Service System collateral for medical professional referral sources included in this toolkit, located on BrandWorks.
  • Medical professional referral sources flyer
  • Prospect flyer to leave behind for referral sources to give to patients
  • Brookdale’s “Personal Service System Value Advantage,” a value flyer to leave behind for referral sources to give to patients
  • Brookdale personal estimate
• Communities within close proximity of each other should work with their regional director of sales or business development market leaders to determine assignments of professionals, so communities do not plan multiple visits to the same medical professionals.
Setting the appointment:
• Acknowledge their busy schedule.
• If you have an established relationship with the medical professional, ask to make a 10 to 15 minute appointment to update their Professional Relationship Profile to ensure we’re meeting their current needs and inform them on what makes Brookdale unique and different, our Personal Service System.
• If they are new medical professionals you’re targeting, ask to spend 10 to 15 minutes with them to understand their needs and develop a Professional Relationship Profile and inform them on what makes Brookdale unique and different, our Personal Service System.

• Medical Professional talking points about our Personal Service System.
  • Brookdale is committed to high-quality services that promote customized care and individualized choice.
  • Our assessments feature simple “yes/no” questions designed to eliminate ambiguity about care needs and preferences, and our service guides and clinical guidelines support our ability to consistently meet the daily needs of all our residents.
  • Prior to move-in our clinical associate will schedule a time to learn about your patient’s specific care needs by conducting our complete personal service assessment. He/she will work with you, your patient’s family and other care providers, such as therapy, to develop a full picture of your patient’s preferences and needs.
  • He/she will evaluate that information to determine a customized care plan based on your patient’s needs as well as wants.
  • Brookdale’s Clinical Guidelines outline best-practice steps to be performed for residents with like conditions.
  • We reassess as needed and work with our licensed clinical associates and therapists, so you can have confidence your patient’s needs are being met by trained and qualified care associates.
  • The personal service system facilitates communication with family members, referral sources, caregivers, nurses and specialists.
  • We go beyond caring for needs as our residents also tell us what they want to better live their lives, and we deliver it to them at the right time and the right frequency.
  • As care needs change, either up or down, a reassessment will help us to continually evolve the care plan, so it’s always on point.

Thank them for continuing to provide referrals to Brookdale.
How to Code a New Referral in the Sales Management System (SMS):

Capture the success of this campaign by accurately coding new referrals from your medical professionals. For new leads, add the primary lead source on the Lead Quick Add page as listed below. Don’t forget to add as much information as you can on this page and save. Then continue to the SMA lead profile, select the Inquiry Details tab (first tab) and add the secondary course to track the campaign as listed below.

• **Primary Lead Source**
  
  **Lead Source**: Referral – Professional  
  **Associate/Org.**: (Select your referral source name.)  
  • Click the SELECT button to the right of this field.  
  • In the new window, click the SEARCH button to display your referral sources.  
  • Select the correct radio button to the left of the name, and click CONTINUE on the bottom right.

• **Secondary Lead Source**
  
  **Lead Source**: Special Event Off-Site  
  **Lead Source Detail**: Educational Program/Seminar  
  **Additional Detail**: Right Care. Right Time. Right People.  
  • Click the SELECT button to the right of this field  
  • In the new window, click the SEARCH button to display Educational Program/Seminar Options  
  • Select the correct radio button to the left of the name, and click CONTINUE at the bottom right.

When you’re finished coding your new lead, make sure you click SAVE. If you need help, please contact salessystemhelp@brookdale.com.
Introducing the Personal Service System by Brookdale.

At Brookdale, our exclusive Personal Service System allows us to provide individually customized care plans for our Assisted Living and Alzheimer’s and Dementia Care residents. Throughout our years of experience serving seniors, we have developed an assessment tool that eliminates ambiguity about care needs and preferences. Our service guides and clinical guidelines allow us to meet the daily needs of all our residents.

We will work and communicate with you, your patient and their family to deliver the high quality care you expect from people who have a passion for serving seniors. The personal service system: the right care, the right time and the right people, available now only at Brookdale.

Call to schedule a personal assessment for your patient.

(000) 000-0000
Right Care. Right Time. Right People.

Introducing the Personal Service System by Brookdale

Prospects Flyer
Leave-behind piece for professional referrals to give to patients.

At Brookdale, we evaluate your care needs and listen to your desires to help you live your life the way you want safely and happily. To put it simply, you can trust Brookdale to make your care our priority.

Through years of experience, we have developed a process that allows us to customize your personal care plan.

Your highly individualized care plan means you only receive the services you need and want.

With our exclusive Personal Service System, you can live your life the way you want with the right care, at the right time, delivered by the right people.

Call to schedule a personal assessment.
(000) 000-0000
## Brookdale PSS Value Advantage

Leave-behind piece for professional referrals to give to patients.*

<table>
<thead>
<tr>
<th>Categories of Care</th>
<th>All Inclusive</th>
<th>Levels of Care</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brookdale's Personal Service System</td>
<td>One price for all services</td>
<td>Bundled with escalating pricing</td>
</tr>
</tbody>
</table>

- Comprehensive system to manage specific resident preferences and needs
- Preliminary review offers timely solutions including cost estimate
- Assessment and plan directly address resident preferences and needs
- Computerized CARE Profile reflects resident’s preferences and needs for each day
- Comprehensive services with logical pricing so resident can “age in place”
- Pricing based on resident’s specific care preferences and needs
- Additional care services bundled
- Once resident’s care exceeds highest charge level, no further options
- Pay one price for services, needed or not
- Pay escalating price for services bundled in a level of care, needed or not

**RIGHT CARE.**  
**RIGHT TIME.**  
**RIGHT PEOPLE.**  
**RIGHT VALUE.**

---

*NOTE: Only to be used by communities using Categories of Care pricing.*
Bringing New Life to Senior Living

Brookdale Personal Estimate
Leave-behind piece for professional referrals to give to patients.*

Brookdale Personal Estimate

Resident Name ________________________  Date ____________________

**Personal Care Estimate**
• Personal services that meet your ongoing care preferences and needs

**Basic Service Rate**
Includes:
• Apartment #__________
• Services and amenities vary by location

**Therapeutic and Select Services**
• Supplemental services that meet your unscheduled needs and preferences
  
  See Exhibits X and Y for additional information

**Total Monthly Charge**

**One Time Fees (if applicable)**
* Does not apply to respite stays

**Deposit (if applicable)**

* The Preliminary Review and Estimate are based on information provided by the prospect and/or responsible party.
* Actual services and charges are confirmed based on the Personal Service Assessment, the physician plan of care and the Personal Service Plan.
* The Personal Service Assessment and Plan will be reviewed using the following schedule:
  - Prior to move-in
  - At move-in
  - Within 14 to 30 days after move-in
  - Upon change in condition
  - Periodically or as dictated by state regulation
* Prices are subject to change in accordance with the terms of the Residency Agreement.

**NOTE: Only to be used by communities using Categories of Care pricing.**
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Contact us to schedule a personal assessment for your patient.
1-888-305-4851

brookdale.com
Professional Relationship Profile

Company Name: ____________________________  Date: __________
Contact’s Name: ___________________________  Time of Appointment: ___________________________
Contact #: ________________________________

Goals: Plan out what unique questions you want to ask this professional to learn about their business. What do you want to accomplish or achieve?
AVIP: Appointment - Visit - In-Service - Person

What are you bringing?
(Flyer, Personal Connection, Community Collateral, etc.)

PRE-PREPARE

“I would like to learn more about you and how I may help you and your business today. Do you mind if I ask a few questions, so I’ll know best how we may partner with you?”

Listen

Tell me about your (company, rehab, practice, etc.) How many geriatric patients does your company/practice care for?

Are you familiar with Brookdale and the services we provide?

Do you currently refer to Skilled Nursing, Assisted Living, Independent Living, Alzheimer’s Care or Home Health? If so, whom?

What do your patients want in a healthcare provider?

What is the most important thing a healthcare provider can do for you in your role? Why?

What is your biggest challenge in finding placement for your patients?

How can we make the referral process easy for you?

What turn-around time do you expect from time of referral to placement?

How do you like to be contacted?

Have you had any experience with our community?

How can we make it even better?

Understand

Enriching the lives of those we serve with compassion, respect, excellence and integrity.

brookdale.com
**Summarize and verify their needs and expectations.**

<table>
<thead>
<tr>
<th>Needs &amp; Expectations</th>
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**SOLVE & ENRICH**

"Based on what we talked about today, I have some solutions and next step recommendations I would like to share with you."

**Advance the Relationship / Next Meeting Date(s):**

(Logical, Timely and Agreed Upon)

**Contact Information**

"I'd like to make sure you have my contact information in case you have any questions."

(Give your cell or work number)

“What is the best number to reach you? Email?"

Name / Title: ________________________________________________

Organization: _________________________________________________

Phone: ___________________ Email address: _____________________

Business Address: _____________________________________________

City: ___________________ State: ____________________________

Best method of communication with you?: _________________________

Frequency of Contact? ________________________________________
# Community Referral Form, page 1

## REFERRAL FORM

### REFERRAL INFORMATION

- **Name:**
- **M**  **F**  **DOB:**
- **Marital Status:** Single  Partnered  Married  Divorced  Widowed
- **Veteran Status:** Yes  No  **Time Frame to Move:**
- **Address:**
- **Phone Number:**

### Responsible Party:

- **Self**  **Other**

- **Address:**
- **Phone Number:**

### SENIOR SOLUTION NEED

- **REFERRAL:** Assisted Living  Alzheimer’s & Dementia Care  Rehabilitation (PT, ST, OT)
- Independent Living  Hospice  Home Health
- Therapy  Private Duty Nursing

### REASON FOR REFERRAL/CONCERNS:

- **Name:**
- **Phone Number:**

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**FAX:**

**PHONE:**

or **Email:**

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**COMMUNITY NAME**

Address

Phone  brookdale.com
INDEPENDENT LIVING
Independent living offers a safe and secure setting for independent seniors. We provide supportive services such as meals, housekeeping, transportation and scheduled recreational activities. We enable seniors to trade in the chores of home maintenance for personal wellness opportunities in an engaging social environment.

ASSISTED LIVING
Brookdale assisted living communities provide residents with activities of daily living and basic support, such as meals, transportation and recreational activities. Trained caregivers assist with care services such as help with medication, bathing and dressing and coordinating services with outside providers. Our individualized care plans provide an ideal blend of convenience and support with respect for individual preferences.

ALZHEIMER’S AND DEMENTIA CARE
Clare Bridge® was created over 25 years ago and continually embraces current research in dementia care, coupled with the experience of caring for thousands of people with dementia. The staff helps residents experience daily moments of success, offering opportunities for residents to find happiness and meaning. A gentle daily structure is provided to help maintain residents’ abilities and encourage use of their current skills.

REHABILITATION AND SKILLED NURSING
Brookdale skilled nursing and rehabilitation centers provide the highest level of round the clock nursing care outside of a hospital setting for an individual’s daily physical, social and psychological needs. Services available include: therapy services such as speech, occupational and physical therapy. The resident’s attending physician oversees the care and services the resident receives. As residents’ conditions progress, our staff works with their families and physicians to transition them to home or the most appropriate care setting.

BROOKDALE THERAPY
Brookdale Therapy offers our Care3℠ Program, which includes individualized care services based on Rehabilitation, Fitness and Education. Available services include Medicare-certified physical, occupational and speech therapies. In addition, many locations offer specialty wellness services such as massage therapy, yoga and personalized training.

BROOKDALE HOME HEALTH
Brookdale Home Health is Medicare certified providing services with a doctor’s order either in a private home or in a resident’s Brookdale home. Individualized care plans help assure the patient’s safety within their home, through nursing management, therapy intervention and safety training and education.

PRIVATE DUTY NURSING
Personalized Living and Brookdale at Home are convenient, cost effective and customized solutions that offer personal support for a range of day-to-day tasks. Each individual’s needs are met whether it is with medication management, concierge services, supportive nursing care and companion support. Whether the assistance is routine or occasional, most services are available seven days a week and can begin within 24 hours.

BROOKDALE HOSPICE
Brookdale Hospice provides an individualized program of physical, emotional and practical care for the patient, with emphasis on pain control and symptom management. Our program is a reflection of our spirit of caring. We emphasize comfort, dignity and respect. We believe that centering our focus on both the patient and the family enables us to provide the best care.