

# CLIENT STRATEGIC BRAND MESSAGING

## BRAND PLATFORM – ALL AUDIENCES

### **Mission**

#### Current

To become the most trusted and respected provider of senior move management and relocation services.

#### Revised Recommendation

Our mission is to provide older adults and their families with all the support and services they need to transition to new living

### **Vision**

#### Current

We strive to be the Total Solution and onside advocate for our clients, keeping the family's best interests at heart in order to maximize results.

#### Revised Recommendation

To extend our reach throughout the US, providing the most trusted respected and comprehensive downsizing and move ma adults and their families.

### **Promise**

#### Current

To minimize stress and maximize results.

#### Revised Recommendation

To help older adults and their families manage logistics and minimize stress during important life transitions.

**Prime Message** (consistent overall impression across audiences)

As the nation's most complete source of trusted information, support, and services, Client takes the worry out of downsizing and relocation for older adults and their families.

**Audiences**

- Seniors, who need added assistance
- Empty Nesters, who are ready to move out and move on
- Adult Children, who need help so they can keep up with their own lives
- Referral Partners
- Potential Franchisees
- Current Franchisees

**MESSAGING – CUSTOMERS**

**Key Message**

Client helps you through a difficult time with trusted information, support, and services for older adults and their families during downsizing and relocation.

<b>Brand Pillars</b>	<b><u>Unconditional Support</u></b>	<b><u>Unlimited Resources</u></b>	<b><u>Unequaled Expertise</u></b>
<b>Primary Message</b>	Providing <b>solutions</b> to help older adults and their families transition to new living situations is a passion and a calling.	Providing <b>services</b> that include everything you need for a smooth transition.	Providing <b>trust</b> and credibility by proactively ensuring quality and professionalism.
<b>Reasons to Believe</b>	<ul style="list-style-type: none"> <li>• We respect the lifetime of memories associated with your possessions</li> <li>• We have experience in difficult situations such as complex family dynamics, extreme clutter issues or memory impairment</li> <li>• We are trained to recognize the symptoms of Relocation Stress Syndrome so that you can seek professional care</li> <li>• We can suggest solutions for associated needs, such as replacing missing paperwork and hiring an estate planner</li> <li>• Many of us chose this career because of an experience similar to what you're going through now</li> <li>• We care for you personally; all locations are independently owned and locally operated</li> </ul>	<ul style="list-style-type: none"> <li>• We provide services and referrals that handle every aspect of your transition</li> <li>• We tailor plans to your specific needs, large and small</li> <li>• We personally provide downsizing, estate sale and move management services: you can trust our integrity</li> <li>• As the nation's largest and most comprehensive transition managers, we negotiate unmatched savings with outside vendors and pass the savings on to you</li> <li>• Our referral network includes trusted sources for real estate, financial management and more</li> <li>• Estate sales and online auctions may help reduce the cost of your move</li> </ul>	<ul style="list-style-type: none"> <li>• All owners have earned Certified Relocation and Transition Specialist (CRTS) designation, the most rigorous industry credential awarded the fields of senior relocation and move management</li> <li>• We are trained to recognize and recommend intervention for the unique stressors faced by older adults during relocation</li> <li>• Advances in technology mean we can conduct online auctions that may help offset the cost of your move</li> <li>• Our relationships with other providers help complete the move faster</li> <li>• We have the resources to help ensure the things you love will fit in your new home</li> <li>• We are the first national organization to specialize in a total solution approach</li> </ul>

<b>Functional Benefits</b>	<ul style="list-style-type: none"> <li>• Stress Reduction</li> <li>• Problem Solving</li> <li>• Easy</li> </ul>	<ul style="list-style-type: none"> <li>• Convenience</li> <li>• Time Management</li> <li>• Cost Savings</li> </ul>	<ul style="list-style-type: none"> <li>• Credibility</li> <li>• Experience</li> </ul>
<b>Emotional Benefits</b>	<ul style="list-style-type: none"> <li>• Trusted</li> <li>• Respectful</li> <li>• Smart</li> <li>• Caring</li> <li>• Insightful</li> <li>• Approachable</li> <li>• Calming</li> <li>• Aware</li> <li>• Enlightened</li> <li>• Personal</li> <li>• Compassionate</li> <li>• Collaborative</li> </ul>	<ul style="list-style-type: none"> <li>• Trusted</li> <li>• Strategic</li> <li>• Effective</li> <li>• Leading</li> <li>• Efficient</li> <li>• Central</li> <li>• Connected</li> <li>• First</li> <li>• Reliable</li> <li>• Honest</li> <li>• Directional</li> <li>• Influential</li> </ul>	<ul style="list-style-type: none"> <li>• Trusted</li> <li>• Deliberate</li> <li>• Visionary</li> <li>• Proactive</li> <li>• Authoritative</li> <li>• Expert</li> <li>• Commitment</li> <li>• Knowledge</li> <li>• Understanding</li> <li>• Professional</li> <li>• Authority</li> <li>• Confidence</li> </ul>

**Messaging – Franchise Development**

<p><b>Key Message</b></p>	<p>Client offers an unmatched opportunity to help people in a caring environment, with the business guidance and regulatory freedom that position you for success.</p>		
<p><b>Brand Pillars</b></p>	<p><u><b>Proven Opportunity</b></u></p>	<p><u><b>Supportive Structure</b></u></p>	<p><u><b>People-Centric</b></u></p>
<p><b>Reasons to Believe</b></p>	<ul style="list-style-type: none"> <li>• Affordable cost of entry</li> <li>• Growing market segment</li> <li>• First and only national source of comprehensive downsizing and move management services</li> <li>• Still a young business where you can have an impact</li> </ul>	<ul style="list-style-type: none"> <li>• Step-by-step guidance</li> <li>• Success strategies</li> <li>• National cost savings you can offer to your clients</li> <li>• Credentialing and instruction</li> <li>• Industry-leading software</li> <li>• Trusted for solutions and services</li> <li>• Complete answers</li> </ul>	<ul style="list-style-type: none"> <li>• Support older adults and their families</li> <li>• Remove the threats posed by unscrupulous competitive vendors</li> <li>• Be rewarded with gratitude as well as profits</li> <li>• Provide a personalized experience</li> <li>• Follow your calling</li> </ul>
<p><b>Functional Benefits</b></p>	<ul style="list-style-type: none"> <li>• Original</li> <li>• Needed</li> </ul>	<ul style="list-style-type: none"> <li>• Leading</li> <li>• Robust</li> <li>• Competitive</li> </ul>	<ul style="list-style-type: none"> <li>• Credibility</li> <li>• Proven</li> </ul>
<p><b>Emotional Benefits</b></p>	<ul style="list-style-type: none"> <li>• Trusted</li> <li>• Guide</li> <li>• Smart</li> <li>• Deliberate</li> <li>• Collaborative</li> <li>• Commitment</li> <li>• Professional</li> <li>• Authority</li> <li>• Confident</li> <li>• Leading</li> <li>• First</li> </ul>	<ul style="list-style-type: none"> <li>• Trusted</li> <li>• Strategic</li> <li>• Effective</li> <li>• Efficient</li> <li>• Connected</li> <li>• Reliable</li> <li>• Directional</li> <li>• Complete</li> <li>• Visionary</li> <li>• Proactive</li> <li>• Insightful</li> </ul>	<ul style="list-style-type: none"> <li>• Trusted</li> <li>• Respected</li> <li>• Caring</li> <li>• Influential</li> <li>• Expert</li> <li>• Knowledge</li> <li>• Understanding</li> <li>• Approachable</li> <li>• Personal</li> <li>• Compassionate</li> <li>• Honest</li> </ul>

Messaging – Referral Points			
<b>Key Message</b>	Client is a concierge to your business, helping your clients find direction during times of great stress, which enables decision-making, positions you as a hero, and leads to sales.		
<b>Brand Pillars</b>	<b><u>Proactive Solutions</u></b>	<b><u>Comprehensive Services</u></b>	<b><u>Trusted Partnerships</u></b>
<b>Primary Message</b>	Providing <b>solutions</b> to help clients beyond the obstacles that are keeping them from completing the sale.	Providing <b>services</b> that include everything your clients need for a timely and smooth transition.	Providing <b>trusted</b> programs which blend seamlessly with your business, so you can recommend them with confidence.
<b>Reasons to Believe</b>	<ul style="list-style-type: none"> <li>We can keep the process moving by providing help with associated needs, such as the replacement of missing paperwork</li> <li>Estate sales and online auctions may help pay for the costs of our services</li> <li>We use space planning software to ensure your clients have everything they need to feel at home on day one</li> <li>We can help jump start decision-making with a home visit</li> <li>We respect your clients and their lifetime of memories and can lead them gently through this emotional period in their lives</li> </ul>	<ul style="list-style-type: none"> <li>We are the industry leaders, personally providing professional estate sales, online auctions and comprehensive move management, decluttering, and downsizing services</li> <li>We lead the market with the newest technology, including a digital approach to home estimates that includes accurate budgeting and standardized pricing</li> <li>We have experience with difficult situations, such as complex family dynamics, extreme clutter issues or memory impairment</li> <li>Our referral network includes trusted sources for real estate, financial management and more</li> </ul>	<ul style="list-style-type: none"> <li>We can partner with you with co-branded promotional materials</li> <li>We maintain the highest operating standards in the nation, including ethical guidelines and staff training</li> <li>We require independent industry certification, insurance, memory care training and employee background screening for all offices.</li> <li>We understand your clients: many of us chose this career because of an experience similar to what they're going through now</li> <li>We care for your clients personally; all locations are independently owned and locally operated</li> </ul>
<b>Functional Benefits</b>	<ul style="list-style-type: none"> <li>Facilitating</li> <li>Problem Solving</li> </ul>	<ul style="list-style-type: none"> <li>Comprehensive</li> <li>Easy</li> </ul>	<ul style="list-style-type: none"> <li>Partners</li> <li>Proven</li> </ul>

<b>Emotional Benefits</b>	<ul style="list-style-type: none"> <li>• Trusted</li> <li>• Compassionate</li> <li>• Patient</li> <li>• Understanding</li> <li>• Appreciative</li> <li>• Confident</li> <li>• Directional</li> <li>• Insightful</li> <li>• Approachable</li> <li>• Calming</li> </ul>	<ul style="list-style-type: none"> <li>• Trusted</li> <li>• Strategic</li> <li>• Connected</li> <li>• Reliable</li> <li>• Complete</li> <li>• Visionary</li> <li>• Strategic</li> <li>• Leading</li> <li>• Central</li> <li>• Influential</li> </ul>	<ul style="list-style-type: none"> <li>• Trusted</li> <li>• Honest</li> <li>• Collaborative</li> <li>• Respected</li> <li>• Expert</li> <li>• Knowledge</li> <li>• Deliberate</li> <li>• Authoritative</li> <li>• Committed</li> <li>• Professional</li> </ul>
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