

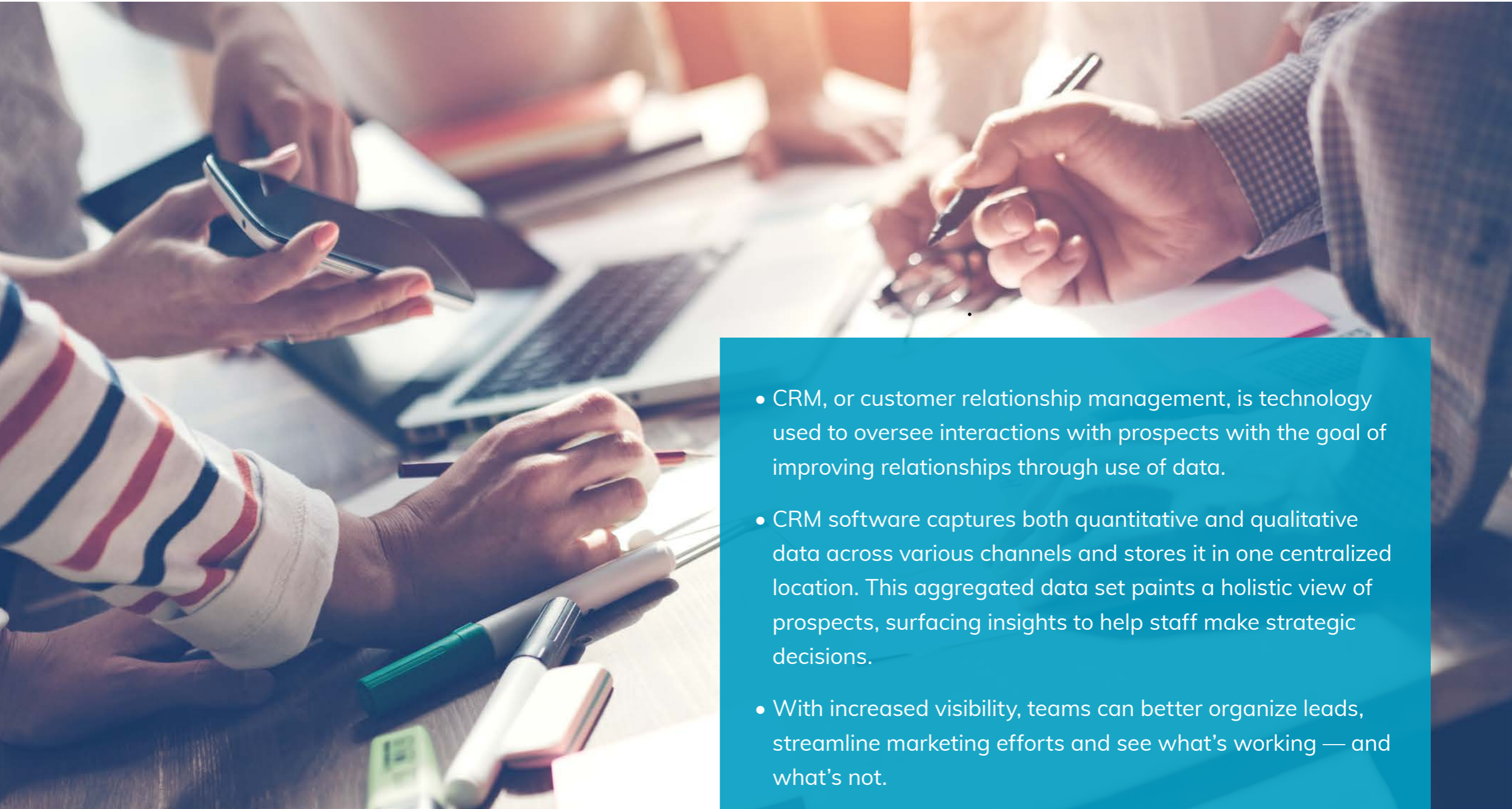
# CRM FOR SENIOR LIVING

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The key to capturing quality leads  
and increasing occupancy



# WHAT IS CRM?



- CRM, or customer relationship management, is technology used to oversee interactions with prospects with the goal of improving relationships through use of data.
- CRM software captures both quantitative and qualitative data across various channels and stores it in one centralized location. This aggregated data set paints a holistic view of prospects, surfacing insights to help staff make strategic decisions.
- With increased visibility, teams can better organize leads, streamline marketing efforts and see what's working — and what's not.

# 3 BENEFITS OF CRM

The demand for assisted living and senior care will grow exponentially over the next decade. A thoughtful CRM program will set your community apart and help pave a path to growth.



## IMPROVE ORGANIZATION

# 1

One of the most valuable features of any CRM solution is the accessibility of information from a single, consolidated source. And because many CRM systems offer mobile-friendly tools, activity tracking has never been easier (or more convenient).



## ENHANCE CUSTOMER SERVICE

# 2

A personal touch makes all the difference when it comes to closing the deal. With every detail stored electronically, it's simple to find a prospect's history and personalize each exchange throughout the sales process. No more fumbling through files or looking for sticky notes.



## INCREASE EFFICIENCY

# 3

Visual workflows bring to light any bottlenecks and redundancies throughout the sales pipeline, and automated notifications keep everyone in the loop. Improved communication between staff members means teams can work together to streamline processes.

# 7 WAYS CRM CAN IMPROVE SALES CONVERSIONS



**01** Supercharge Marketing



**02** Shorten Lead Response Time



**03** Centralize Data



**04** Optimize Contact Strategy



**05** Strengthen Client Relationships



**06** Automate Communication



**07** Simplify Workflows



# 1 SUPERCHARGE MARKETING

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CRM allows you to track and analyze the performance of various online marketing vehicles to see where your dollars are working hardest. Once you know which channels and campaign types are most effective for your business, you can optimize precious marketing spend to maximize ROI and reduce cost per lead.

While millennials use technology the most, baby boomers also embrace digital life. **85%** of boomers report using the Internet, **68%** own smartphones and **52%** utilize tablets.<sup>1</sup>



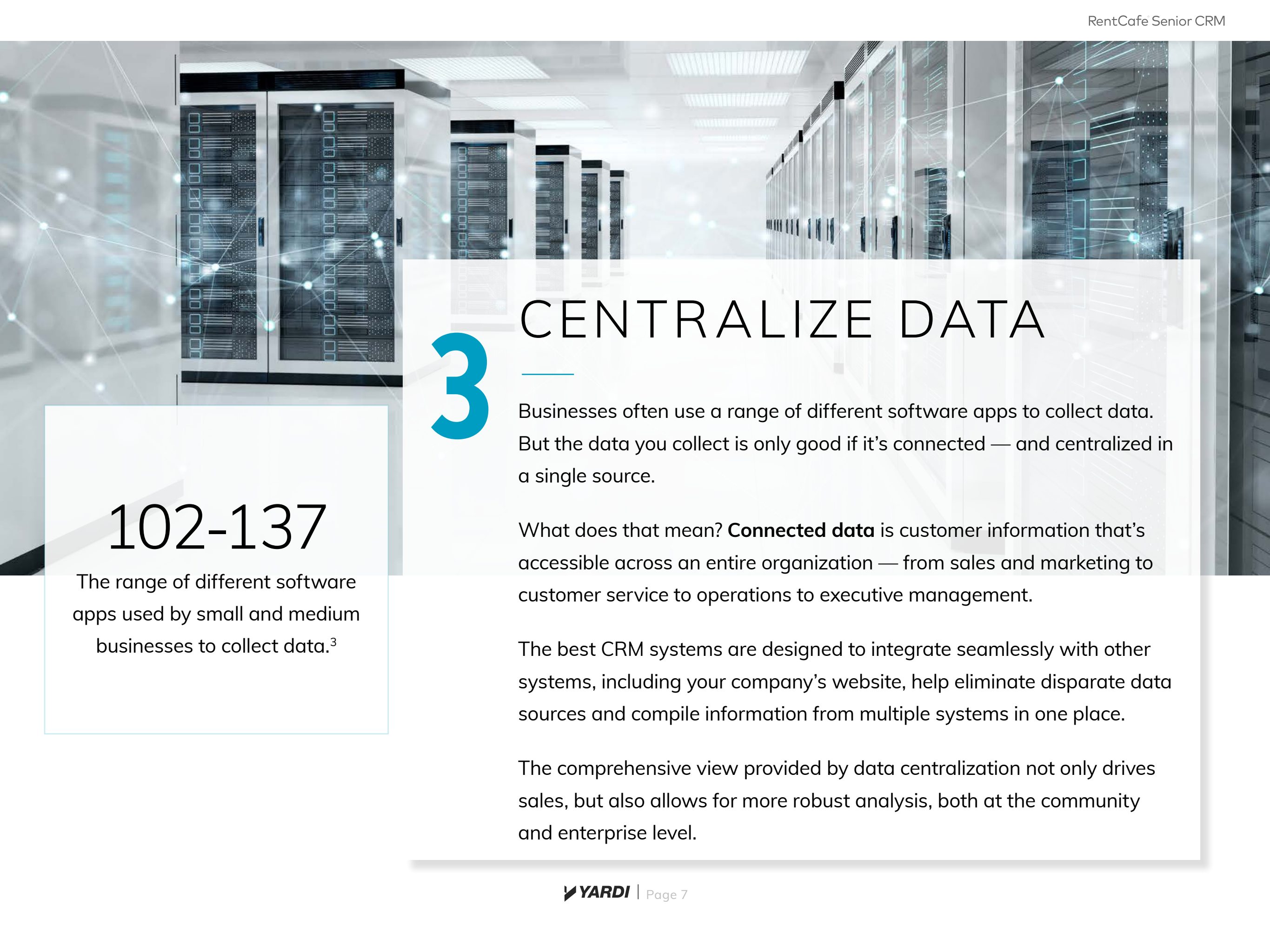
# 2 SHORTEN LEAD RESPONSE TIME

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When it comes to timeliness, prospects expect a rapid response from companies. Leads are more likely to convert if they're contacted within minutes, rather than hours or days.<sup>2</sup>

However, many senior living communities face resource constraints, so optimizing staff is a must. CRM systems automate tasks, like notifications of new leads and referrals, to make them consistent and repeatable. And because most CRM platforms are mobile-optimized, sales staff can access tools on the go, making it simple to respond to leads and referrals quickly.





# 102-137

The range of different software apps used by small and medium businesses to collect data.<sup>3</sup>

# 3

## CENTRALIZE DATA

Businesses often use a range of different software apps to collect data. But the data you collect is only good if it's connected — and centralized in a single source.

What does that mean? **Connected data** is customer information that's accessible across an entire organization — from sales and marketing to customer service to operations to executive management.

The best CRM systems are designed to integrate seamlessly with other systems, including your company's website, help eliminate disparate data sources and compile information from multiple systems in one place.

The comprehensive view provided by data centralization not only drives sales, but also allows for more robust analysis, both at the community and enterprise level.



**58% of companies** use testing to optimize conversion rates. The most common variable tested? The call to action.<sup>4</sup>

# 4 OPTIMIZE CONTACT STRATEGY

Every company — and every prospect — is different. Certain messages resonate with a specific audience or channel, while others fall flat. Because marketing is not a one-size-fits-all endeavor, it's important to find what works for your unique business model.

Leading CRM tools allow teams to test different approaches to messaging and frequency, then review performance with powerful analytical tools to take the guesswork out of lead nurturing.



# 5 STRENGTHEN CLIENT RELATIONSHIPS

Prospects are more than just lines in a database, they're real people with complex wants and needs. Capturing and recording each customer's story, adding specifics at each touchpoint in their journey, allows staff to recall personal details and forge relationships and trust with prospective residents and their families.

The more you know about the prospects in your pipeline, the better you're able to serve them — and hopefully move them into your community.



Building trust is paramount to conversion. **81%** of customers won't do business with — or buy from — a brand that they don't trust. **89%** expect to disengage from a brand that breaks their trust.<sup>5</sup>

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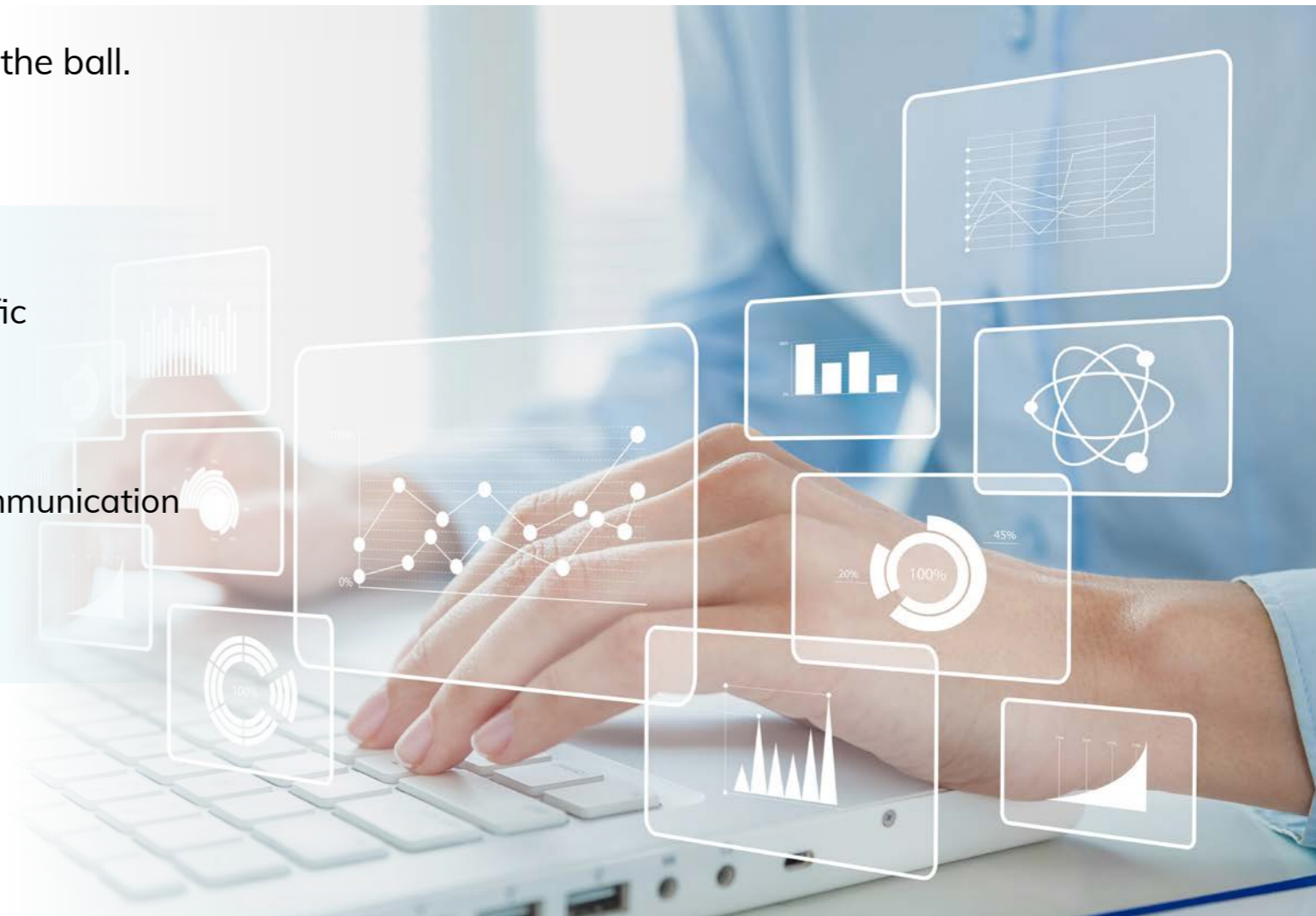
# 6 AUTOMATE COMMUNICATION

Marketing automation means never dropping the ball.

With CRM software, you can:

- Send intelligent text responses
- Create email campaigns triggered by specific events in the prospecting flow
- Initiate real-time alerts
- Automate appointments and follow-up communication
- Bulk-post on social media
- Free up time for staff members

These tasks can create efficiencies for your team — and generate better response rates than time-consuming one-off campaigns.



Did you know automated emails drive conversion rates **180%** higher than batch emails, and generate **320%** more revenue?<sup>6</sup>

# 7 SIMPLIFY WORKFLOWS

Landing a sale is not an event, it's a process — especially when you consider that people researching senior living options aren't just shopping for goods and services. They're looking for a community for themselves or their parents.

It's an emotional decision, and it can take some time.

Most CRM systems offer a central, online dashboard for sales staff, allowing agents to see where each prospect is in the process and how to proceed to the next step and close the deal. This visual approach is the most effective way to take the guesswork out of the sales flow while nurturing leads along what can be a very long sales process.



# WHAT CLIENTS SAY ABOUT RENTCAFE SENIOR CRM

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“ RentCafe Senior CRM delivers many benefits and has helped us increase sales performance across the company and occupancy across our communities. I highly recommend Yardi’s integrated solution because it covers all aspects of senior living. ”

—GINO GENTILE,  
VP OF SALES AND CUSTOMER SERVICE,  
PROVIDENCE PLACE SENIOR LIVING

Providence Place Senior Living is family owned and managed with the mission of creating value for its residents through responsive service and quality care at all its communities.



For more information about RentCafe Senior CRM or any other product from the [Yardi Senior Living Suite](#), contact us. We're here to help!

Email [Sales@Yardi.com](mailto:Sales@Yardi.com) or call 800.866.1144

Senior living thrives on Yardi

At Yardi our mission is to provide our clients with superior products and outstanding customer service, while we take care of our employees and the communities where we work and live. With that commitment, Yardi leads the industry in providing full business software solutions for real estate investment management, property management, business intelligence, financial accounting, asset management and ancillary services. Organizations like yours have been using our proven and mature software with confidence for decades.

#### Sources

1 [Pew Research Center](#) 2 [Forbes](#) 3 [Blissfully](#) 4 [Invesp](#) 5 [Gartner](#) 6 [Campaign Monitor](#)

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