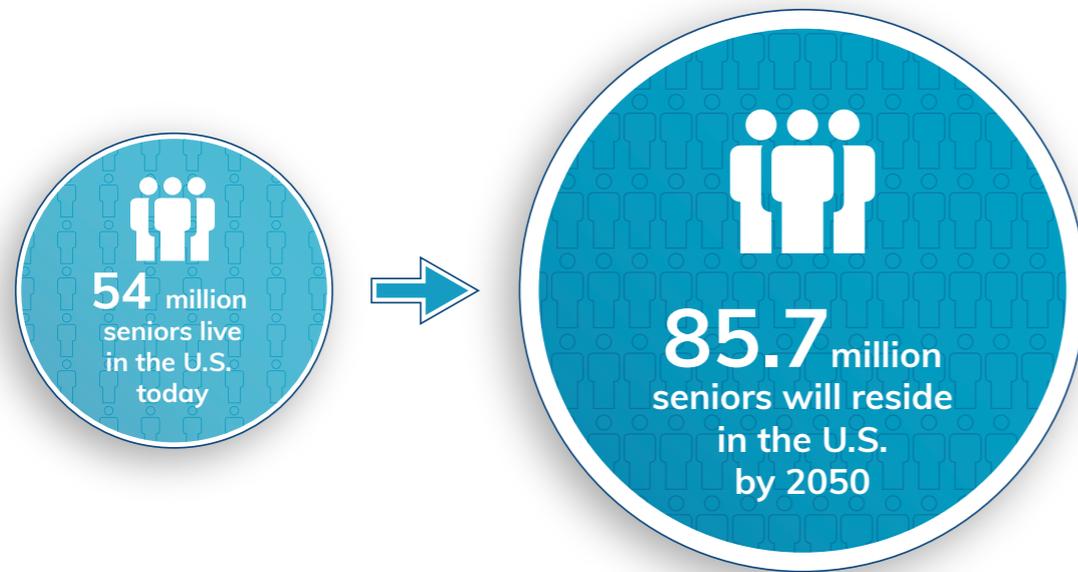


# CRM SOFTWARE: THE FUTURE OF SALES & MARKETING

Discover top advantages of a thoughtful CRM program in senior living

- ✓ Simplify leasing
- ✓ Nurture leads effectively
- ✓ Boost customer service
- ✓ Streamline assessments
- ✓ Ensure compliance

# Looking ahead



*Did you know more than **54 million** adults ages 65 and older live in the United States — roughly **16.5%** of the total U.S. population? And by 2050, that number is projected to rise to an estimated **85.7 million** — roughly **20%** of the U.S. population?<sup>1</sup>*



As America's aging population continues to grow, more will be searching for adequate housing opportunities to fit their needs — from active adult to independent to assisted living, all the way to memory care.

What does this mean for owners and operators? Plain and simple, you'll require effective methods to attract prospects, nurture leads and retain residents as demand grows and competition heightens. You need a systematic approach to your sales and marketing, one that sets your communities apart from the rest.

# Level up with CRM technology

Customer relationship management (CRM) software is the answer of today and tomorrow. By capturing and centralizing the data you need, an integrated CRM system accelerates sales and ensures a seamless prospect-to-resident journey.

Keep reading to learn five advantages of CRM software in senior living, and see how a leading solution offers bonus benefits to help you succeed.

Looking for more? This ebook offers insights from an industry leader thriving with CRM tools today.

Nearly nine in ten (89%) sales organizations have CRM technology.<sup>2</sup>



# 01

## Simplify leasing

It's no secret that paper leases are error-prone and time consuming to create. You run the risk of recording incorrect data, losing documents and creating confusion through the move-in process and beyond.

Integrated CRM software eliminates those risks. With everything digitized in one place, generating leases and initiating move-ins becomes seamless. Sales counselors can craft custom documents at the click of a button, storing every detail in a secure format and closing the window for errors.

### The Yardi difference

RentCafe Senior CRM is a mobile-friendly sales and marketing solution. Integrated with multiple elements of the Yardi Senior Living Suite, RentCafe Senior CRM makes lease generation, signature collection and document management a breeze.

- ✓ Create customized electronic leases packed with deposits, care level, concessions, quote sheets and more
- ✓ Allow residents and families to sign leases electronically in RentCafe Senior Living (secure online portal)
- ✓ Search for unit rates, billing information and documents connected through Voyager Senior Housing (community management powerhouse)



*“Sales directors love that they can easily generate lease documents after everything they’ve put in. There is a big time savings factor in utilizing Yardi’s electronic leasing tools.”*



**KIM SMART**

Director of Systems and Support  
Anthology Senior Living



# 02

## Nurture leads effectively

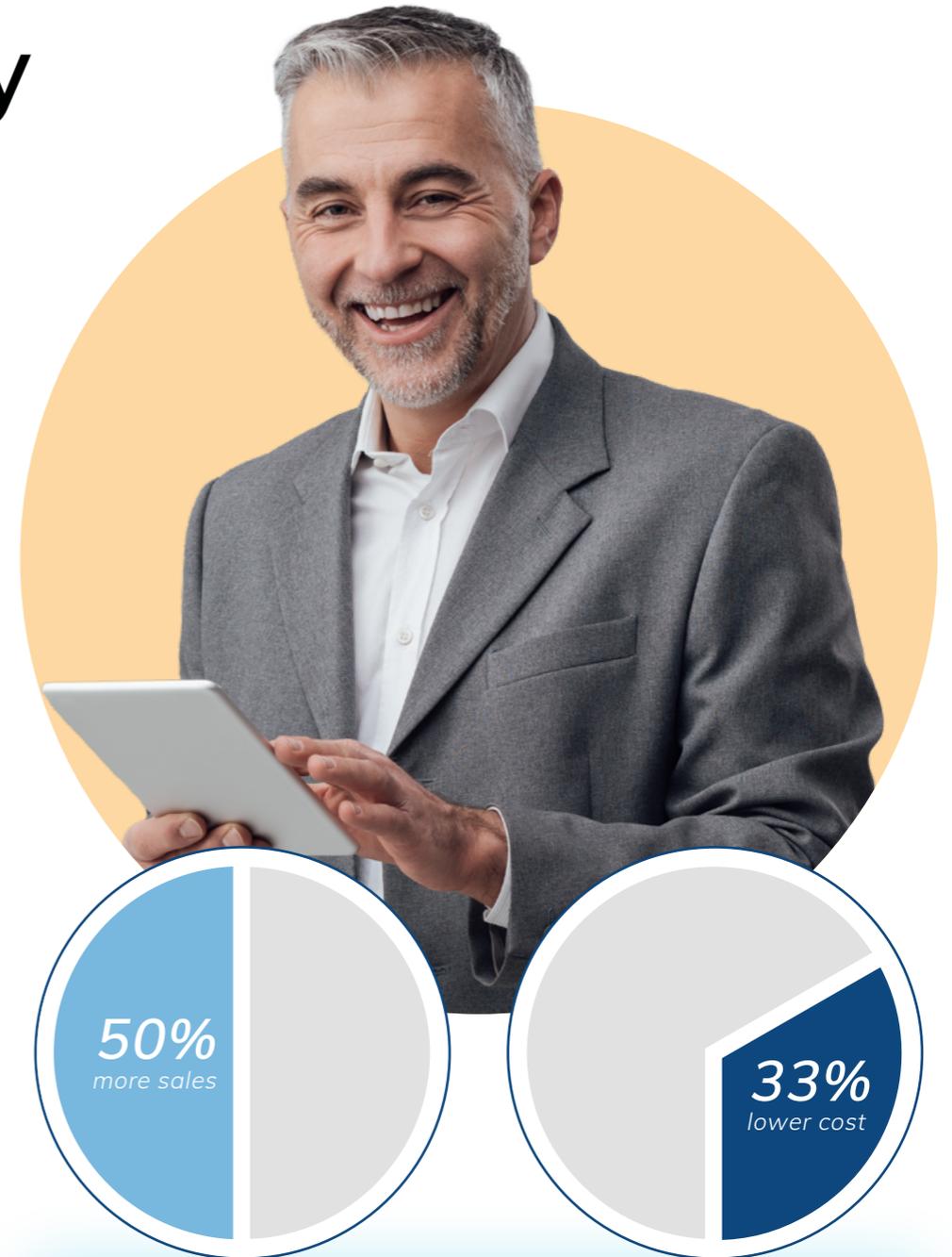
Tired of lost prospects and missed opportunities? Tracking leads manually is a recipe for just that. Without a configurable, intuitive platform for managing leads from the get-go, sales counselors aren't set up for success.

With CRM technology, you unlock a lead staging workflow that keeps the sales cycle on track. From activity monitoring to lead scoring, a dynamic solution offers features that enable more organized, responsive actions from your sales team.

### The Yardi difference

With RentCafe Senior CRM on your side, the days of mishandled leads are in the past. All lead-related data is stored and automatically updated on a single platform, helping sales counselors target goals — and build positive relationships — with ease.

- ✓ Enhance staff efficiency with guided activities, stages and action items
- ✓ Enjoy customizable flashcards with drag-and-drop functionality to track progress
- ✓ Oversee census, correspondence, appointments, events and campaigns in one place



*Companies that excel at lead nurturing generate **50%** more sales-ready leads at a **33%** lower cost.<sup>3</sup>*



# 03

## Boost customer service

Providing excellent service throughout the prospect-to-resident journey is crucial. Unfortunately, offering great service gets difficult when sales counselors are responsible for monitoring all incoming calls and tracking follow-ups manually.

CRM software brings the benefit of call automation, meaning your community can provide around the clock service without draining staff members. No leads slip through the cracks and prospective residents get the prompt service they deserve.

### The Yardi difference

RentCafe Senior CRM integrates with RentCafe Connect (flexible call center solution) to ensure no prospect call goes unanswered. Ready to foster better connections and boost service? It starts here with timely, automated support.

- ✓ Combine digital answering services with optional on-demand live support
- ✓ Prioritize the calls most likely to convert using powerful analytics to maximize your ROI
- ✓ Add RentCafe Conversations (enhanced service) to access bulk texting, email tracking and automated text follow-ups



*“Our communities now get to hear calls that they didn’t get to hear — they come directly to their dashboard and it becomes a part of their day.”*



**KIM SMART**

Director of Systems and Support  
Anthology Senior Living



# 04

## Streamline assessments

To avoid duplicating data come assessment time, and to give residents the best service down the line, caregivers need access to information collected by sales. On the reverse, sales counselors need assessment results to generate move-in proposals. But creating an efficient thread of communication is difficult without proper technology in place.

An advanced CRM system allows real-time data to flow between sales staff, community managers and caregivers. You eliminate the burden of disconnected data, helping assessments run smoothly and enabling team members to make informed decisions.

### The Yardi difference

Integrated with Yardi EHR (dynamic electronic health record solution), RentCafe Senior CRM centralizes the data your staff needs, streamlining assessments and improving move-in workflows as a result.

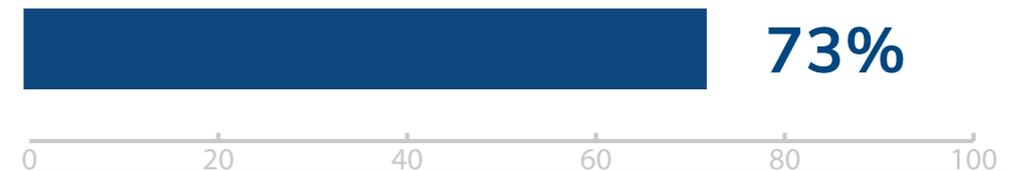
- ✓ Empower sales and care staff to work together on a single platform
- ✓ Inform decisions at the point of care to improve resident retention
- ✓ Establish care levels and billing recommendations to guide move-in proposals



*boosting productivity*



*increasing efficiency*



When using mobile CRM, companies reported boosting productivity by **50%** and increasing efficiency by **73%**.<sup>4</sup>



# 05

## Ensure compliance

With paper files or data stored in separate systems, meeting compliance needs gets tricky, and audits stay stressful. Whether you're checking the accuracy of service charges or staffing ratios, siloed data makes details hard to find, leaves room for error and leads to hours spent amending issues.

By operating with integrated CRM technology, you're equipped to meet compliance needs at all times. Having everything accessible on one platform helps your communities stay accountable — making audits less of an obstacle.

### The Yardi difference

Since RentCafe Senior CRM and Yardi EHR work in harmony, you can quickly pull key data like care level determination anytime. Digitized, centralized workflows mean mistakes are being caught in real time and when audits come around, you aren't scrambling to find what you need.

- ✓ House all resident care data in one secure place
- ✓ Avoid the costs of non-compliance with digital workflows that prevent errors
- ✓ Enhance the resident experience by holding your communities to the highest standard



*“If I have an auditor who’s looking back at everything, RentCafe Senior CRM makes it easier. I don’t have to go back to the community and ask them for documentation. If we’re looking for information, it is right there in one location. There is no guesswork in terms of where it is or who filed it.”*



**KIM SMART**

Director of Systems and Support  
Anthology Senior Living



# More on RentCafe Senior CRM

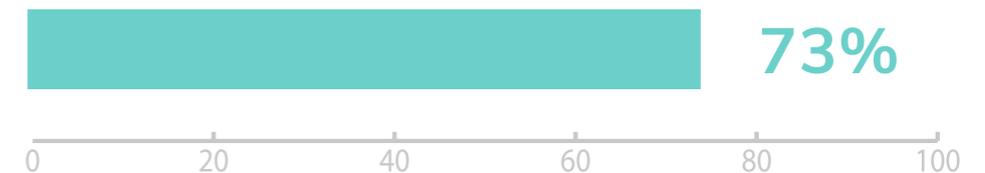
## WHAT MAKES THIS SOLUTION UNIQUE?

RentCafe Senior CRM is ...

- ✓ SINGLE STACK
- ✓ MOBILE-FRIENDLY
- ✓ HIPAA AND SOX COMPLIANT
- ✓ CONTINUOUSLY EVOLVING
- ✓ GUIDED BY CLIENT FEEDBACK

### ***DID YOU KNOW?***

*Unlike other CRM systems, RentCafe Senior CRM doesn't require you to pay per user. You can add as many users as you'd like — from sales staff to caregivers — for one fixed cost. Same goes for our portal, RentCafe Senior Living.*



In a 2022 survey, **73%** of respondents listed platform capabilities as the most important factor when selecting a CRM solution.<sup>5</sup>



# THANKS FOR READING!

As you work to stay competitive in the senior housing space, having a solution that advances your sales and marketing is key. We hope this served as inspiration to explore your options and start building success with CRM technology.

Ready to continue learning about **RentCafe Senior CRM** and the Yardi Senior Living Suite as a whole? Our team would love to be your guide! Get in touch with us below.

## BOOK A PERSONALIZED DEMO

### Sources

1. America's Health Rankings
2. Gartner
3. Invesp
4. Finances Online
5. Gartner

