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SUPERIOR SUCCESS WITH A CRM DESIGNED SPECIFICALLY FOR SENIOR LIVING

The right technology can help you optimize staff efficiency, maximize occupancy and boost revenue

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Customer relationships are a key to any successful business, and nowhere is this more true than in senior living. The decisions your prospective residents are making are of the utmost importance, and they will trust you to provide the needed information and support at a crucial time in their lives.

Given the life-changing nature of a move into senior housing, a customer relationship management system designed specifically for senior living is a must for connecting with prospects. Your future residents de-



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— CANDACE SEIDLE, SENIOR TEAM LEADER, YARDI

serve exceptional service that moves their journey from life-changing to life-affirming. At the same time, your business can take a big step along its path to continued success by investing in a CRM that optimizes staff efforts, maximizes occupancy and boosts revenue.

"Any move can be stressful, but it's a particularly big deal to move into a senior living community," said Candace Seidle, senior team leader, Yardi. "People can have many different concerns about getting older and living in



a community. A CRM designed for senior living can help your team identify who your prospects are, where they are in the decision process, what's important to them and what hurdles they are going through in their lives."

ALL THE DATA, ALL IN ONE PLACE

Seidle said that the RentCafe Senior CRM, which is part of Yardi's fully integrated Senior Living Suite, is designed to create positive relationships with prospective residents and nurture leads from first contact to move-in.

A key feature of RentCafe Senior CRM is that it allows data to flow automatically to the resident record in Yardi Voyager Senior Housing. This means that all of the information necessary for your corporate team, business and accounting personnel, and care team is compiled in one place, eliminating the burden of managing separate databases for executive directors and sales and marketing personnel.

"A good CRM should do the work for you and allow you to focus on what's most important: building relationships. It should really help you learn who your prospects are," Seidle said. Each senior living provider has a specific sales process, and the RentCafe Senior CRM is configurable and allows providers to incorporate their own unique approaches to nurturing leads, she added. If a provider's current CRM doesn't do that, "it's time to look into an upgrade," Seidle said.

The RentCafe Senior CRM, because it is specifically designed for senior living, captures the nuance and scope of the senior living industry, including clinical assessment recommendations, key demographics and health insurance documentation, she added.



A PROVIDER'S PERSPECTIVE

Based in Charleston, SC, Harmony Senior Services has 32 independent living, assisted living and memory care communities in 13 states. The organization has been using RentCafe Senior CRM since 2012.

Charity Stanis, director of sales enablement at Harmony Senior Services, said that key features of a good senior living CRM include being user-friendly, easy for new hires to learn, customizable and able to adapt to changing strategies.

"All of those are things we have found with Yardi's RentCafe Senior CRM," she said.

"The Yardi system allows us to see our performance in real time and in ways that are very easy to understand," she said. "It shows us the areas in which we're succeeding and the areas in which we may need to pivot to meet our goals."

CHOOSING THE RIGHT CRM

In addition to a keeping track of prospects and helping them move easily through the prospect-to-resident journey, Seidle said, a quality CRM also will help a provider keep track of its sales playbook, incorporate lead stages into the system, score leads and keep track of events, such as open houses. Yardi's RentCafe Senior CRM has all of those capabilities.

Many of the system's features can be implemented relatively quickly as part of its basic setup, to meet the needs of prospect management, Seidle said. Then, advanced features can be added based on the provider's



preferences. "With RentCafe Senior CRM, all advanced features are included," Seidle said. "We don't 'nickel and dime' providers, and we don't charge per user. A provider can on-board as many users as they want or need."

Stanis said that when Harmony Senior Services looks into the future, the company sees a growing need to in-

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terface with new partners in the senior living tech space.

"We see so many tech companies coming into the senior living space with new tools that make it easier for both our sales managers in the community and for customers," she said. "Having a CRM that is able to integrate with those is one of our top priorities, and Yardi's CRM solution absolutely fills that need."

A NOW AND FUTURE PARTNER

When implementing a CRM, providers will want a partner that offers strong training and support. No matter how intuitive and easy using a CRM may be, many configurable components can be customized to help providers optimize their experience.

According to Seidle, Yardi takes much pride in providing training and support after the sale. This effort includes train-the-trainer courses, dedicated end-user training and an elearning program.

"Yardi's implementation team is on board any time we add or update a feature or component, to make sure everything goes smoothly," Stanis said.

She concluded that Harmony's experience with Yardi's RentCafe Senior CRM has been very positive — and she anticipates that will be the case well into the future.

"The team at Yardi is very innovative when it comes to developing new products and new tools within their system to keep us current with or even ahead of what the market is demanding," she said. ■



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Opt for a partner that offers strong training and support.