

**eKPI CASE STUDY**  
**A HUMAN FIRST perspective on  
the search for senior living**



The **COLLECTIVE AGENCY**  
powered by Krow Media & Adage Marketing Group

2022





## KEY FINDINGS

This report identifies key barriers to the sales process, highlights breakdown with internal communication and underscores the impact of HUMAN FIRST experiential planning.

### Significant Barriers:

- Identification - Consumer Behavior Patterns
- Accessibility - Rates & Incentives
- Reachability - Phone vs Chat vs APFM
- Communication - Preferences Respected
- Authenticity - Bonus Points!

It's more than smarter forms and adding marketing automation, because the users are HUMAN FIRST.

**Design for experience, execute with emotional intelligence.**

# SETTING THE SCENE

(to connect)

## Resident Story

Mother-in-law (Judy) has been diagnosed with Alzheimer's; age 83

## Influencer Story

Calling for information for my husband's (James) mother, Judy, who has been diagnosed with Alzheimer's (if they ask stage - moderate). Judy currently lives with my husband's sister (Norma) so we're looking near her, but my husband would like to be involved in the decision.



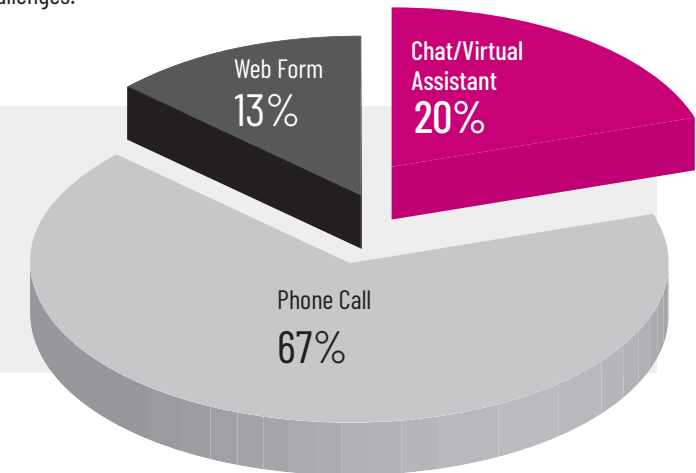
We are not local so I have compiled a list of questions from various sites, to get an idea before we make the trip, especially with the holidays and winter coming.

If it's easier for you just to email me or mail me whatever information you have and then what answers are not included I can call back and ask - but I do need pricing, to make sure it's not too expensive. Also, will that pricing increase for 2023?



After over a week of phone calls, forms and chats, the prospect still only has a modicum of connection and HUGE gaps in the most basic information needed to make a monumental decision like selecting a senior living provider for a loved one experiencing memory challenges.

## Initial Contact Method



**27%**

Unreachable on first attempt

### Initial Contact Outcome

No Answer	7%
Voicemail	20%
Answered - Salesperson N/A, provided basic info	13%
Answered - Salesperson N/A, will call you back	20%
Answered - Spoke to Salesperson, Very Informative 5-Star Call	7%
Completed Form	33%

**33%**

No callback

### Follow-up Call

NONE	33%
Same Day	33%
Next Day	27%
3 Days	7%

**27%**

No email

### Initial Email

NONE	27%
Same Day	33%
Next Day	33%
3 Days	7%

**40%**

No informative follow-up

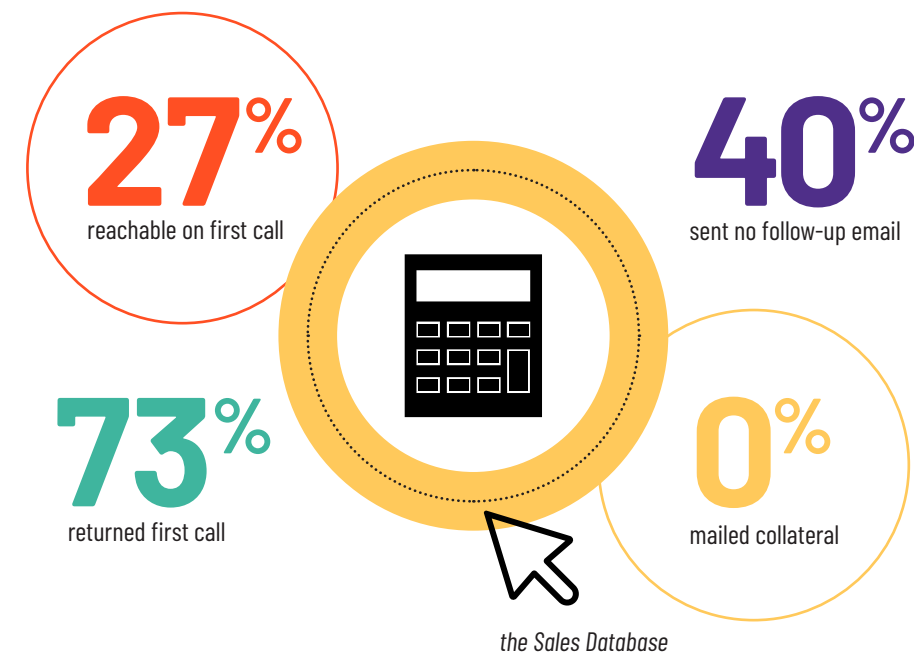
### Email Summary

NONE	40%
Sent a few attachments	7%
Good information including virtual tour and invite to follow their Facebook for more insight on community	7%
Sent a lot of helpful information	13%
Sent additional information with several attachments	7%
Sent basic information with brochure attachment	7%
Sent pricing/rate info	13%
Sent pricing/rate info and VA benefits	6%

# CAPTURING THE STORY (or not!)

Considering the fact that the caller was prepared to offer it, let's take a look at how well the sales teams did at extracting as much personal information from the prospect...

Activity	YES	NO	PROVIDED (VIA FORM)
Contact Name Collected	53%	7%	40%
Potential Resident's Name Collected	20%	80%	
Additional Influencer Inquiry	7%	93%	
Email Requested	27%	20%	53%
Permission to Email Collected	20%	80%	
Phone Number Requested	27%	40%	33%
Permission to Text Requested	7%	93%	
Contacts Address Collected	0%	100%	
Permission to Mail Requested	0%	100%	
Potential Resident Interest Inquiry	7%	93%	
Inquired about Veterans Assistance	7%	93%	



## ZERO. NADA. ZILCH.

That's how many tangible collateral packages were sent. How much the average community spends on marketing materials in a fiscal year varies, but 0% of leadership wants to know that their collaterals are collecting dust. This is most likely attributable to the fact that the same number of sales teams took down mailing addresses. We can only guess what the CRM data looks like...

## CRM Tips for Sales Enablement

Instilling in your sales counselors the importance of the sales system and CRM, training them in their use, coaching them to success regularly, expecting a recap of their activity at the end of the week, and reviewing their database with them regularly will increase sales and new move-ins.

*Setting Sales up for Success - Effective Training & Expectations (Speed to Lead, 24 Hour Minimum, etc.)*

*Tools for Success - API Integrations with CRM + Call Tracking Software*

*Coaching - End of Week Recaps + Regularly Reviewing*

## Benefits of Good Data Hygiene

CRM (Customer Relationship Management) software can help better identify and nurture leads from different marketing channels. With all prospects, referred leads, and professional outreach data in a unified place, the sales process is streamlined. Effectively utilizing the CRM software will help save significantly on time, effort, money, and resources.

*Working quality leads from different marketing channels*

*A well-utilized CRM can track and automatically creates/de-duplicates profiles*

*Utilize workflows to automate sales and marketing processes while maintaining customization*

*Shortening the sales cycle will increase move-ins*

## CRM Integration Benefits

CRM platforms that do not integrate with lead referral sources and incoming lead generating platforms (websites, landing pages, etc.) create an unnecessary obstacle by requiring sales teams to spend time and effort manually importing leads into the database. Open API integration allows you to pick and choose the marketing systems that suit your senior living company best. Integrations recommended typically include:

*MailChimp/Constant Contact*

*Roobrik*

*OneDay*

*Further / SiteStaff Chat*

*A Place for Mom & Caring.com*



If CRM adoption is presenting challenges reach out to our Certified Analysts today.  
Hello@TheCollectiveAgencySL.com

# SALES PROCESS (breakdown)

## FROM THE SOURCE: What we KNOW

- According to Google, 75% of senior living consumers research options on search engines.
- 6,000 online searches related to senior care are made every hour in the US, reports Senior Housing News.
- 68% of senior living marketers say their website is their most effective channel.
- DialogTech found that 70% of senior living and care consumers will call during the consumer journey.
- More than 60% of tours at senior living communities are the result of an inbound call, according to NextWave Care.
- BIA reports that phone calls convert 10-15x more revenue than web leads, making calls are the most valuable conversions senior living and care marketers can drive.
- Forrester found that:
  - Callers convert 30% faster than web leads.
  - Caller retention rate is 28% higher than web lead retention rate.
  - 85% of marketers believe inbound calls and phone conversations are a key component of their organization's digital-first strategy.

How well-informed and prepared were the sales teams to sell the lifestyle that their community offers? Let's take a look...

Timeline	YES	NO	DETAILS
2022 Rates	93%	7%	
2023 Rate Projected Increase	60%	40%	7% (3-5%) Increase; 20% - Unknown Increase
Special Offers/Discounts	40%	60%	2022 Rate Lock, One Month Free, 50% Off Community Fee Discount, VA Benefits, 25% Off Room Rate for 12 Months (if move-in by EOM)
Ancillary Care Programs (i.e. Continence)	27%	73%	
Higher Level Services (i.e. Escorting, Dining)	33%	67%	
VA Aid & Attendance (Collateral or Referral)	13%	87%	
Floor Plan Options	47%	53%	
Activity Calendar	0%	100%	
Dining Menu (i.e. Special Diet Accommodations)	93%	7%	
Virtual Tour Video	40%	60%	

All "Come in for a Tour" and no "How's your day?" Makes prospects think you're a dull boy/girl!

# CONCLUSION

**ExperienceMatters.**

## Design Unforgettable experiences

While your sales and marketing teams work tirelessly to represent your company, ultimately, your brand is defined by what others say about you. And let's face it - we currently live in a time where nearly everyone has something to say. Customer experience is no longer taking a back seat to product development and pricing research and has become equally important. In fact, a recent article concludes

Customer experience currently drives more than **60%** of brand loyalty - more than price and product combined.



So, why has customer experience become so influential? AMC Technology contributes much of the importance of customer experience to the following:

- Technology plays a bigger role in decision-making than ever before, and most consumers research online before making decisions.
- Companies discovered that consumers spend even more time researching before making purchasing decisions in times of economic uncertainty.
- 82% of customers prefer working with brands that foster authentic connections.
- 89% of US consumers who have a negative experience are willing to jump ship to a competitor.

**The innovators at The Collective have put together a handy checklist to help forward-thinking organizations plan to capture the prospects of tomorrow (currently waiting for a call back in your sales team's voicemail!).**



# STILL DON'T BELIEVE EQMATTERS?

Access the definitive business case for emotional intelligence.



## First Impressions Checklist:

Online Brand Overview				
First Impressions		Score	Possible	Category
First Impression Image:	Desktop		insert screengrab	
	Mobile		insert screenshot	
	Primary/Initial CTA:		1	Best Practices
	Overall Tone/Vibe:		1	Brand Positioning
Digital Footprint		Score	Possible	Category
Review Sources:	<a href="#">Caring.com</a>		1	Digital Signature
	Ratings:			
Review Sources:	<a href="#">apfm.com</a>		1	Digital Signature
	Ratings:			
Review Sources:	<a href="#">SeniorAdvisor.com</a>		1	Digital Signature
	Review Sources:			
	Ratings:			
Website Funnel		Score	Possible	Category
	CTAs:		1	Best Practices
	Forms:		1	Best Practices
	Follow Up Emails:		1	Best Practices
	Blog:		1	Social Standing
	Newsletter:		1	Best Practices
	Podcast:		1	Best Practices
Social Presence		Score	Possible	Category
	Social Platform:		1	Social Standing
	Social Platform:		1	Social Standing
	Social Platform:		1	Social Standing
	Social Platform:		1	Social Standing
	Social Platform:		1	Social Standing
	Social Platform:		1	Social Standing
	Social Platform:		1	Social Standing
	Social Platform:		1	Social Standing
Brand Messaging & Marketing		Score	Possible	Category
Overview		Score	Possible	Category
	Taglines:		1	Brand Positioning
	Positioning Statements:		1	Brand Positioning
	Areas of Inconsistency:			
	Outdated Information:			
Services		Score	Possible	Category
	Services:		1	Brand Positioning
	Features:		1	Brand Positioning
Differentiators		Score	Possible	Category
	Programs:		1	Brand Positioning
	Affiliations:		1	Brand Positioning
Pricing Transparency		Score	Possible	Category
	Pricing:		1	Best Practices
	Incentives:		1	Best Practices
Sales Enablement/Alignment		Score	Possible	Category
	Chatbot:		1	Best Practices
	Click to Call:		1	Best Practices
	Self Serve Tools/Calculators:		1	Best Practices
	Free Resources:		1	Best Practices
	Downloadable Floorplans:		1	Best Practices
	360 Virtual Tour:		1	Best Practices
SCORES				
	Category	Totals	Score	Possible
	Brand Positioning:			7
	Digital Signature:			3
	Social Standing:			8
	Best Practices:			14

**HUMAN FIRST**  
**EXPERIENCEMATTERS.**

**QUESTIONS? CALL OR  
TEXT ANYTIME - WE  
(ACTUALLY) RESPOND.**

**570.772.7264**



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