# Executing a Successful CRM Migration

*By Steve Moran*

## Fear of Change: It doesn't only affect our prospects

Change is something professionals in senior living advise on every day. Yet when we are faced with change, we often find ourselves having the same questions and fears as our prospects. This year, many of our colleagues in the industry are seeking to replace their Marketing & Sales CRM system as one of the most widely used tools in our field is being retired. Communities are exploring their options and asking questions all too familiar to those typically on the listening end. What will we do? When should we do it? Who will help me navigate the options? How do I know I'm making the right decision?

Sound familiar? The team at Continuum CRM understands the thought of changing after years of using one system can be daunting. There are a lot of options today in senior living CRM software, and it can be difficult to know where to start. Here is some guidance to assist in your selection process.

## Starting the Search: Make a list of needs, wants, and non-negotiables

Determine what it is you want to get out of your new system. Is it more robust reporting? What about having a place to manage all your referral networks? Do you want custom fields to capture more data for future analytics? Do you have a defined sales process you want your team to follow? OR, do you want someone to help you define a process based on your culture and way of doing business? Do you want to manage marketing efforts in the CRM? Are you adopting marketing automation and need a robust integration with HubSpot or Act-On? Are you growing and expanding into Home and Community based services and need a tool that can simultaneously support multiple service lines?

All the above are things you need to consider and define before you start the search. If you do, it will help you convey to CRM providers what you need, and it will be easier to determine whether they'll be the right one for your team. Have a checklist at the ready and make sure you use it. Do the due diligence the process deserves and choose the platform that best aligns with your goals and objectives. Make sure you can identify which items on your checklist are needs, which are wants, and which are non-negotiables. You don't want to get sucked into a sexy sales pitch only to find out after you've signed a contract that the CRM you chose can't satisfy a requirement such as supporting multiple service lines, or a specific report your leadership team requires.

## Data Migration: Select a partner with experience

One of the biggest concerns I hear from our prospects looking is "Will all my data transfer?" There is a lot of fear surrounding the potential for lost information. Make sure the vendor you select can seamlessly transfer your data including your waiting lists and historical activities.

## The Project: Discuss expectations before making your selection

When transitioning your CRM, you cannot afford to spend countless hours directing the CRM team on how to integrate your new software into your existing culture. Discuss expectations and feel comfortable knowing the project team will perform all the behind the scenes work so your team to focus on selling your community. Select a team that will develop a solid plan and schedule for the project timeline and rollout, taking your current operations and systems into account.

## Practice What You Preach: Embrace the change

Just like your prospective residents, you will go through the stages of change from fear to acceptance. I encourage you to embrace the process of selecting a new CRM and dive into it with an open mind, seeking a better way to manage your own prospect database. Think of it as your opportunity to get a shiny new toy.

Let the experienced team at Continuum CRM help guide you on this journey and use our experience to assist in the transition.

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