

Are you part of the 5%?

Only 5% Think This is Important: That's a Problem

By Susan Saldibar

A recent webinar, attended by Kristin Hambleton, VP of Business Development for Continuum CRM, included a poll, asking participants what they valued most as they prepare to purchase a new CRM system. Their choices included things like price, various features, marketing automation, and post-sales support. Only 5% considered post-sales support important! That's a troubling number, and Kristin connected me with Lynn Madderra, VP of Operations to talk about why it should be 100%.

[Continuum CRM](#) (a Senior Housing Forum partner) puts an impressive amount of time and effort into properly training those using their software. Lynn told me straight away that her mission is to change the mindset that the journey ends when the new system is installed. "Implementation is the beginning not the end," is her mantra. And she means it!

Post-Sales Support has a goal: Ensure customers can stand on their own feet.

When Continuum installs its CRM into a senior living community, much of their success hinges upon how well the users can, as Lynn puts it, "stand on their own feet" using it. They should be able to add to and change the CRM, connect to more additional sources and grow the CRM along with their senior living community.

I asked Lynn how they get to that goal. As you may have guessed, it's all about that post-sales support, which Lynn is quick to remind us should be considered critical among 100% of users, not 5%. Here is what they do to get their communities implemented and self-sufficient:

- **Train at least two people to administrate the software.** "We strongly urge each community we work with to assign at least 2 people who can manage the system," says Lynn. "As an example, they need to know how to put something new into the system, such as a new piece of data about prospects, without feeling trapped or getting stuck," she adds. Almost everything the Continuum support team does, she believes can be done by a knowledgeable administrator. But one person can't possibly utilize 100% of system straight out the gate. That's why they encourage training two capable administrators. Makes a lot of sense.

- **Spread the training period out.** Continuum provides a combination of on-line training and live training with a dedicated project manager over a period of weeks during startup. There is a lot to learn that can't effectively be squeezed into a couple training sessions. "We recommend spreading out the training period so users have a chance to get comfortable with the system, ask questions and maybe even come up with new ideas," Lynn says. "The knowledge of how to use the system effectively needs to become engrained in the fabric of what they do. It really is a growing experience," she adds.
- **Provide multiple ways to get support.** "We never close doors to a customer," Lynn says. While she recommends the help desk support as most effective in getting a ticket filed, she knows there are others who may want to pick up the phone and call. "Users need to know that they can file a ticket, pick up the phone, or send an email. Knowing they have multiple choices of communication is so important."
- **Conduct 3, 6 and 12-month check-ups, after the implementation.** Even if a community is clearly successful and operating on their own, Continuum will still check in with them at least a few times each year. "We want to know how the system is working for them," Lynn says. "By regularly checking in, they are getting the attention they deserve and we get the benefit of their opinions and ideas. We have never been a 'build it and they will come' organization."
- **Provide ongoing training.** This is critical, Lynn tells me. It keeps people up to date on all that the system can do. And there really isn't any type of training they can't provide. They offer ongoing on-line training as well as more focused functionality or features training. They do refresher webinars and site visits if needed. "We want to serve customers in way that best serves their unique needs and style," Lynn says.

The implementation should be your starting point, not end point.

Finally, communities should look for a CRM provider who understands the value of true partnering. Continuum has broken free of the old "hand-off" system that pushes the customer further and further away from the person who sold them the system. The Continuum model keeps everyone involved. That means a customer will continue to hear from the account manager who sold them the software, as well as the project manager who worked on their implementation, both of whom have been tuned into their goals and needs earlier in the process. They lend their insight and guidance to the support team as well.

"Above all, the community leadership needs to make it clear to all of their CRM users that the starting point is the implementation," Lynn says. "They need to feel comfortable that their system is actually supporting their efforts and not the other way around!"

You can meet up with Continuum CRM at the Argentum conference, booth #444. Click [here](#) to schedule a meeting at Argentum.

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