



Could This Shorten the Distance to Your Move-In?

By Susan Saldibar

If I had a dollar for every sales rep I knew who had a “gut feeling” about a prospect that misfired, I’d have a nice chunk of change. One of the hardest things in sales has always been knowing when the prospect is ready to move to the next step. If you pushed too hard, you were likely to turn them off. If you waited too long to push, you risked losing them altogether. So there has traditionally been this gray area that some were better at navigating than others.

Now, thanks to technology and a more intelligent use of data, that gray area is shrinking. At least to a degree. And it’s making a huge difference in the sales approach in senior living.

Are you tracking things like “desire”?

Part of the credit goes to CRMs which have gotten more sophisticated and thus better at unpacking that gray area and pulling out details that guide the sales rep along. A great example of this is what the folks at [Continuum CRM](#) (a Senior Housing Forum partner) are doing with their Prospect Readiness scoring tool. I almost want to label it as AI, given the granularity of detail it provides to the sales counselor. It even tracks things like “desire”. You can’t do that without some pretty sophisticated stuff going on in the background.

Here is why what Continuum CRM is doing is so important in today's "occupancy hungry" climate.

- **It conforms to the uniqueness of the community and their prospective residents.** So it is easily configurable to exact descriptions and steps to a sale. It can also be configured to adhere to KPIs created by third party marketing companies, for those who use them.
- **There is less reliance on gut-work and more making intelligent moves.** The Continuum CRM dashboard helps sales counselors answer questions that were once unanswerable, such as: "Do you think a prospect should be making a deposit based on where they are in the sales process? Do you think they need more education and discovery?"
- **You can put your greatest effort where it will yield the greatest return.** How does a sales counselor know when to engage with a prospect and when to let their marketing drip campaign do the nurturing? And what is the best way to get around some of the "not ready" roadblocks that pop up? The system's 4 scoring areas cover each major phase of the sale from education/awareness to ready to buy.

With tools like this, Continuum CRM breaks away from what has been a dry period with CRMs which have, for the most part, been stuck on a one-dimensional scoring model. That's better than nothing, but it only takes you so far. Now, with Continuum's deeper bench of data, more sophisticated algorithms are possible. Scoring areas are weighted for those steps which carry more weight than others. It bases its scoring upon knowledge built from data accumulated through the prospect's journey, along with sales input. Ultimately, the 4 scores roll up to a weighted grand score.

Is this tool about as close to fool proof as we can get?

It's one thing to know the steps your prospective resident takes before saying "yes". It's another thing to know when they are ready to move to the next step and when they are not. Nothing, of course, is foolproof. But we are seeing CRM tools, like the Continuum CRM Prospect Readiness scoring tool, which are light years ahead of where we were only five years ago.

What Continuum has done is an intelligent marriage of process and deep prospect insight. In this industry with twists and turns up ahead we have yet to encounter, boy do we need that.

You can read more about Continuum CRM's Prospect Readiness scoring tool [here](#).

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