How to Keep the Closing Paperwork from Killing the Sales Process

By Susan Saldibar

Your organization spends over $1,000.00 in marketing dollars to get the resident in for a tour and you are about to get a move-in commitment. Your sales rep shines in her ability to move residents across the finish line. Visions of the latest technologies and amenities dance in their heads. Everyone is feeling positive about the move.

Then, reality sets in. Dozens of documents sit on the desk. All need to be taken and signed, either by the resident or his or her family. Time stands still. You have already spent $1,000.00. The question is: are you going to give the resident a $1,000.00 experience? Probably not, if you are still using a traditional admissions process. The move-in will now be on hold until the last document is signed. The sales rep goes from showing off the community advantages to bracing themselves for a long, tedious period of document chasing and hoping they get everything completed and signed.

I spoke recently with Darren Mathis, Founder and CEO of LincWare, the creators of Admit+ (a Senior Housing Forum partner). He has seen the results of this big "let down" after a new resident says "yes" and the paperwork begins. "Suddenly you go from talking about amenities to stacks of admissions documents, which need to be completed and chased down by the sales team," he says. "That's where things can really go downhill quickly," he adds.

If ever there was a process crying out for automation, admissions has to be it. Why don't more senior living communities put automation to work on the admissions process? Darren tells me that they may not realize the risks associated with old methods and don't see how dramatic the upside can be. Here are just a few of the "upsides" Darren describes:

- **Promises kept. Continuation of Quality.** "Why build up your community as being on the leading edge of care quality only to revert to an antiquated paper-based method of onboarding them?" Darren asks. "It says something about a community itself as well as how residents can expect to be treated," he adds. By providing a smooth, hassle-free admissions process, a community is creating a positive onboarding experience. Remember, this is your first real business transaction between you and the resident. Residents don't remember what you said, they remember how they felt. Are they feeling stressed throughout the paperwork process?

- **Keeping sales selling, not chasing and badgering.** The bottom line is, when you have sales chasing down paperwork instead of engaging with prospective residents, nobody wins. Darren hears often from clients how great it is to keep them connected to the selling process and communicating the many advantages of a community, not having to switch gears towards low value, high stress tasks.

- **You get your move-in faster.** This is huge for communities that want to keep the flow of a new admissions smooth and get their residents quickly settled into their new environment. Darren reports a reduction of time spent on the admissions process from days to about 30 minutes. That is because the entire process is centralized and digitized. A structured process with a simple signing process ensures nothing is missed. "Visiblity - everyone knows the status of the move-in 24x7," Darren says. "If a step has not been completed, sales can quickly determine where the hold up is and be proactive, instead of reactive. Visibility is key," he adds.

Building credibility helps smaller to mid-sized communities compete with the "big guys".

There is another point Darren feels is important to make here. Many operators don't realize that what happens after a new resident verbally commits to your community can actually increase your standing and credibility among your competitors. "We're actually hearing community leadership tell us that having automated admissions process helps smaller to mid-sized communities look and feel more like a national brand, allowing them to compete more effectively with the 'big guys'," Darren tells me. That's improving your competitive advantage. Not a small "upside" by any means.

There are many more advantages to automating the admissions process. And Admit+ has a collection of videos that describe all of them. You can access the videos here.