



Why You Should Do This Before Christmas

By Susan Saldibar

Was purchasing a new CRM on your shopping list for 2018? Did you do it? Or are you carrying the project over to 2019?

Before you move that number over to the 2019 column, think about getting it done in 2018. I spoke recently with Kristin Hambleton, VP of Business Development for [Continuum CRM](#) (a Senior Housing Forum partner). She sees way too many senior living community operators putting projects on hold that could have been benefitting them months ago. “If you start taking steps now, you can make a selection and begin putting the pieces in place before the end of the year,” she tells me.

Skeptical? I was too at first. But the process Kristin lays out is pretty straightforward.

First, Kristin suggests you get the team together. Before you contact any vendors, before you see any demos, first talk with the people who will be using the system. Makes a lot of sense. No one knows what they need better than your sales and marketing people. And it pulls them into the process in a positive way. “When you listen to what your users tell you they need and configure your CRM to fit those needs, you’ll have a tool they will actually use,” Kristin says. And, once you have that input you know what you need to be looking for. That, she tells me, will move the process along more efficiently.

Assuming you have your list in hand, I asked Kristin what senior living communities should be looking for with today’s more sophisticated CRMs?

Not surprisingly, she has a pretty long list. However, here are a few things that really stand out:

- **Data Migration:** Absolutely critical. Make sure the vendor you select can seamlessly import your data. That includes wait lists and prospect history, among other things.

- **Tailored user experience:** Make sure they can deliver role-based layouts and custom data fields. You'll want a tailored experience, with data fields related to your team's daily tasks. That will dramatically increase user adoption.
- **Simultaneous support of multiple service lines:** Today, communities operate many lines of service, perform community outreach, and manage the census. Each community needs to have their own set of data fields, workflows, and supporting reports. Your CRM must be able to keep up with the diversity of your portfolio and service offerings.
- **Defined Sales Process:** Having a defined sales process that everyone follows is the key to success. Whether you want a pre-defined process or want to build your own, make sure to implement a CRM that supports that process. Bonus points if it can simultaneously support multiple processes or workflows that tailor the experience for your different service lines. (Hint, Continuum CRM does!)
- **Marketing Automation:** The future of senior living marketing and sales involves automation. Whether it's having a more efficient way to send and track emails, or deliver relevant content, select a tool that supports marketing automation.

Once you have a good handle on which of the above each CRM vendor can provide, you need to ask about the process of implementation and training, Kristin says. Here are some good questions to ask about implementation:

- How long will the project take?
- What involvement and time commitment is expected from our community?
- How will they support training on the new CRM?
- What kind of support do they offer on a long-term basis. Do we have to pay for it?
- Do they offer ongoing on-line training? Live support? A built-in knowledge base?
- Will the CRM support changes we need to make to data fields, workflows and reporting?
- Can we make changes ourselves or do we have to pay for professional services?

"It's important to do all this before you sign any contracts," Kristin tells me. "Only when you feel satisfied that the vendor is on point with all your needs and wants should you lock in to the purchase decision," she adds.

Finally, Kristin urges communities not to let a busy schedule or fear of the length of the project keep you from moving forward! She estimates that you'll need between 90-120 days to be up and running efficiently. Start now and you'll be off to a running start in 2019.

Meet the team from Continuum CRM at the upcoming LeadingAge Expo in Philadelphia. Stop by booth #550 or schedule a time to meet using [this link](#).

CONTINUUM CRM™



This article has been brought to you by [Continuum CRM](#) in partnership with [Senior Housing Forum](#).