



Are You Using This to Drive Move-Ins?

By Susan Saldibar

Who are you counting on to make the best lead generation decisions for your community? Marketing or Sales?

Most would agree that marketing should be driving the effort with sales input, of course. And they should be making their decisions based on access to solid sales intelligence about their various leads and sources, including things like why certain leads convert and other don't.

So, since that data comes out of your CRM, your marketers should be really rocking your CRM, right? Are they? Or is your CRM still largely the domain of sales, used primarily to manage the funnel and look at how many leads Joe has called back and how many tours he has booked. That's yesterday's CRM. Today's CRMs have grown way beyond that.

Marketers need to stop trying to turn their Excel spreadsheets into CRMs. It doesn't work.

Kristin Hambleton, VP of Business Development for [Continuum CRM](#) (a Senior Housing Forum partner) told me that there is a reason CRMs have evolved so much over the last few years. There is more data available and a greater demand by users to provide a deeper, more granular information set. That drives innovation. So CRMs, like Continuum, are rapidly becoming the ultimate strategic dashboard. Now if we can just get more marketers to use them.

I asked Kristin why she thinks marketers continue to rely on the sales team for reports and insights from their CRMs. The biggest challenge, she tells me, is educating them on what their CRMs can do. Another challenge is Excel. Because, sadly, most marketers continue to while away the hours attempting to make Excel do a fraction of what CRMs are able to do. It doesn't work. "So marketing still relies on sales to capture all kinds of data," says Kristin. "But, by doing so they are locking themselves out of important insight and intelligence. They need to gain control and start pulling their own reports with that data," Kristin says.

Yes, fellow marketers, CRMs can do all that!

I asked Kristin to elaborate a bit more on how senior living community marketers can get more strategic value out of their CRMs. “First of all, you need to be looking at your total lead lifecycle, not just the ‘up front’ numbers,” Kristin tells me. That’s a challenge for a mindset that continues to be driven by volume. “Marketers will look at the number of leads and say, ‘Let’s keep paying for lead source X because it gives us more leads than lead source Y’,” says Kristin. “Yet it may well be that lead source Y is driving more actual sales. A powerful CRM helps you dig deeper to answer a more valuable set of questions.”

So, instead of just looking at quantity, the CRM allows marketers to dig deeper. “One of the most popular metrics is ‘inquiries-to-tour’,” Kristin explains. “But what you really should be looking at is ‘inquiries-to-deposit’. That’s a better number to attach to the value of your leads.”

And you can do that with newer CRMs, such as Continuum, that will pull data from virtually any system. You’ll get more tangible results and better insight. And it may become obvious that, instead of executing 20 different campaigns just to cover all ground, you can do 10 more targeted campaigns using your top 10 inquiry to deposit sources. If your CRM tells you that 40% of move ins come from resident referrals, that’s where to focus. Yes, fellow marketers, CRMs can do all that!

Better input leads to better output too!

And there are also tools in your CRM that marketing can use to improve the quality of sales communications. Kristin told me about the email marketing tool they have built directly into the Continuum CRM system. Marketing can create an unlimited number of templates that provide more strategic on-brand messaging. “Sales folks typically go into Outlook with email messages such as ‘Hi, just checking in’, which are completely ineffective,” Kristin says. “They can’t structure branded messaging; it’s not their forte. But, using the CRM, the marketing team can structure the emails so that sales will sound more on point and be able to meet each prospect where they are in their buyers’ journey,” she adds. That’s a great example of leveraging the CRM for both marketing and sales towards the same goal.

“When both marketing and sales actively use the CRM, it opens up the dialog and removes old silos,” says Kristin. “They can actually sit down together and share results. The dialog even changes from ‘Why didn’t you do this’ to ‘This worked for us as a team. This didn’t work, let’s not do that anymore. Let’s do this!’” Marketers . . . maybe it’s time.

You might want to start by reading the Continuum guide, “CRM for the Marketing Team” which contains details on how marketers can strategically use their CRMs to full advantage. You can download the guide [here](#).

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