A Tantalizing Method for Getting Better Leads

By Susan Saldibar

Here's something we should be seeing a lot less of these days: Cold calling. If you've ever done it, you remember pounding those phones to get your 50-70 in before the end of the day. Scrambling to squeeze in your "Hello, I'm…" to so-called "prospects" (that you know next to nothing about) before they slam down the phone. Demoralizing. No wonder so many of us hit the bars after work.

But now we have this perfect storm of technology -- internet, big data, automation, CRM, platform integration -- all working together to put cold calling in danger of extinction. And nobody's complaining.

I spoke recently with Lynn Madderra, VP of Operations for Continuum CRM (a Senior Housing Forum partner), to get more details about their bi-directional integration with HubSpot and how it's working. I know that Continuum has an open API, which means it will integrate with just about any marketing platform. But, as a marketer, I think the HubSpot integration is a particularly smart move in that it allows access to a pretty deep bench of options. That, plus Continuum makes a pretty powerful combination. (More about that later.)

Today's prospects are self-educating. They're smarter. Communities need to get smarter too.

First of all, I asked Lynn to share her thoughts as to where we are today in terms of senior living marketing and how CRMs, like Continuum, have picked up the pace to deliver something that would have been virtually unheard of a short number of years ago.

"Today's prospects are smarter, so we need to be smarter as well," Lynn tells me. "This is a digital world where prospects can self-educate, so we need to service them in that fashion and build on a foundation of information until they're prepared for a call," she adds. That means creating a sales/marketing environment where every step of a prospective resident's journey is crystal clear, along with the best possible action to take to meet them where they are in the process.

Bi-Directional Integration

As for the "bi-directional" integration between the CRM platform and the marketing automation platform, I asked Lynn to expand on why it's so important. Two reasons, she tells me.

1. It helps marketing develop more pertinent messaging. Take post-tour, as an example. Continuum workflows in HubSpot will know this and suggest sending post-tour information. That not only makes for better messaging to the prospect but helps sales have a richer conversation. No more lost opportunities through inept messaging or conversations that don't mesh with where the prospect is. That, in and of itself, is worth a lot.

2. It eliminates guesswork. Without that bi-directional flow, marketing automation will continue to send information based only on a timeframe or certain triggers. Lacking good information from the CRM, marketing is left to "guess" at those trigger points. "The worst thing is when there is a disconnect with sales, who is ready to engage, but the marketing automation system doesn't know they've moved on to the next stage," Lynn tells me. "So they send something impersonal. That turns prospects off."

Getting Started

You don't have to have HubSpot to create a more bi-directional sales/marketing relationship.

Sales cycles, especially for ILs and CCRCs, can be long. So it's not unusual to have a prospect just drop off because you didn't know enough about them and where they were in their journey to have a meaningful presence there. Having a bi-directional integration between your marketing automation and CRM creates a hand in glove relationship between marketing and sales, Lynn tells me. "These people are self-educating themselves because they want to make a well thought out decision. You can be a helpful resource and keep them engaged. But your efforts will backfire if you intrude on them before they're ready," she says.

Smaller communities can use Continuum with a bit more manual input of information and get a similar result. So, you don't have to go out and buy HubSpot if your budget doesn't allow for it. Lynn suggests that, if you're just getting started, you can manually input actions to fit each trigger point. The goal remains the same. Don't hand a lead off to sales until that prospect has, as she puts it, "raised their hand".

"We're not the 60-second people."

Lynn is well aware of the sales pressure to get numbers up --45r` more tours, deposits, move-ins, etc. And when the numbers aren't there, the knee jerk reaction is to increase activity and start calling those who "might" be ready. But she forewarns those who take that route that it will get you to one place only…right back into the cold calling trap.

"If you want to continue just popping notes in and moving your leads around, we're not the provider for you," Lynn says. "We're not the 60-second people. We are deeper than that. It's time to value quality interactions over quantity. And now we have the means to do it!"