

The Ultimate Guide to Senior Living Lead Follow-Up

Create a process to contact more leads, set more appointments, and drive more move-ins for your community.



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The Senior Living Lead Journey

The senior living journey is not like most other consumer decisions that the typical buyer will have to make in their lifetime. Typically this is a new experience for the prospect, and therefore there's often a huge educational component that's going to be required. The process can be long and emotional. And ultimately the final decision will be an expensive one. As a senior living community, having trust and authority in the eyes of your prospects is huge. Your potential residents are looking for guidance. And if your sales and marketing process is done correctly, prospects will come to view your organization as a trusted advisor. However, send them the wrong message at the wrong time, offer a tour when they are not ready, or neglect to follow-up in a consistent yet respectful way, and you risk losing that prospect forever.

Senior Living Journey



L2T SYSTEM



Characteristics Of The Senior Living Journey

It's Typically a Long Process

One particular struggle for sales and marketing in the management of inbound leads and follow-up is just how long the sales cycle is in Senior Living. According to research done by Imagewerks Marketing, the sales cycle average for consumers seeking out independent living, for example is 120 days, while assisted living purchasing decision cycle for an average of 70 days. The process is long. It takes two years for 47 percent of the people who have started a search into independent living to move into their new homes. This means that follow-up and constant “hand-holding,” for lack of a better word, is paramount.

It's high-Touch and Personal

The amount of touches this takes, too, is astonishing. Whereas average B2C conversions might take anywhere from 7 to 10 touches, converting senior living residents takes an impressive 25 touches. Again, too, each of these touches is “high touch” requiring consideration and careful, personal management of each lead. The more personalized you can make the buyer’s journey for your prospects the better. Each person is different. Different needs, different timelines, and different budgets. It's your job as a senior living provider to optimize their journey so you provide the information that is best fitted to each prospect, at the appropriate time. And do so without being overbearing or overly salesy....it's a big task to take on – we know.

It Can Be Highly Emotional

Another somewhat obvious yet important fact is that the journey into a senior living community can be highly emotional. Whether it's the senior themselves, or the adult child who's moving in their parents, it is a huge life change and this fact cannot be understated. Unlike sales and marketing in other industries, senior living more than other requires a high level of empathy. If you're insensitive to your prospects journey you will lose that prospect FAST. This is an important reality to always keep in mind when crafting your lead response process (which we'll touch on later)



How Senior Living Sales & Marketing Is Changing

The Switch to Digital

This shouldn't come as new but over the past 5-10 years even senior housing has started to go digital. As baby boomers age into senior living, their loved ones are accessing information across a wide variety of channels, increasingly via online content and social media. While adoption of these methods of communication were slow to catch on with boomers and their adult children, they are now commonplace. Traditional outbound efforts such as advertising and direct mail are becoming less prevalent and companies are allocating more and more of their budget and resources to their sales and marketing efforts online.

The majority of prospects begin their search on Google. After that, however, a whopping 70 percent of senior living prospects will place an inbound call to potential senior living providers at some point in their buyer's journey. Since only 17 percent of these consumers have one provider in mind while researching Senior Living, this means that these inbound calls are an enormous opportunity to be the first to interact with the prospect and differentiate your community. With so many communities competing for the same residents, it's vital that you have a process in place to capitalize on inbound leads and make sure none go to waste.



“

Baby boomers continue to enter the senior phase of life. This is creating the largest demand for in-home care services, assisted living care, and nursing home care. [Forbes research](#) says 67 million people over the age of 60 will soon need senior care on some level.

”

- Senior Care Clicks

A New Problem Emerges

The switch to the digital age has forced the Senior Living industry to change in a variety of ways. While many of the changes are making things easier and more efficient, it also creates a whole new set of problems to solve. While online lead generation is definitely a problem to solve it's one that many companies (including 3rd party referral sites like A Place for Mom and Caring.com) have been solving for decades. What we've found from working in the industry for the past 5 years is that there's actually a much bigger and less obvious problem that faces the senior housing industry: lead response & management.

While lead generation methods have become increasingly sophisticated in the Senior Living industry, lead management and lead response has not.

- The average number of follow-up attempts required to contact a lead is between 6-8. The average number of follow-up attempts in Senior Living is between 1-2.
- [35-50% of sales](#) go to the vendor that responds first. You need to be responding to new leads within 5-30 minutes if you have any chance of getting them on the phone. The average response time in the Senior Living industry is 72 hours.

This lack of follow-up results in an average contact rate in the Senior Living industry of about 20%.

Hubspot defines contact rate as "as a meaningful conversation with the prospective customer that initiates a conversation leading to the qualification of an opportunity." This means that out of every 5 inbound leads only 1 person ever has a direct correspondence with a Senior Living company and has a meaningful conversation. 80% of leads are effectively wasted from a sales and marketing perspective. When you take into account that each Senior Living lead costs approximately \$150 to generate, you quickly begin to see why lead response & management is a massive problem for the industry..

In these pages, we will attempt to help you fix this lead response problem. Through years of working with clients in the senior living industry we've been able to develop a proven lead response process that results in a consistent 80%+ contact rate. The process ensures that each lead gets responded to within 5-30 minutes, and followed-up with between 8-10 times. This e-book will give you the blueprint to set up a lead response system for your senior living company and ensure that you never miss a digital opportunity again.

30 MINS

"You're 100X LESS LIKELY to get in touch with a digital lead after 30 mins." (MIT/Kellogg)

12-48 Hours

Average Response Time in the Senior Living Industry.

5-12X

"It takes an average of 5-12 Sales touches to convert a lead." (Salesforce)

1-2X

Average number of times a SL lead is followed-up with before calling it quits.

78%

The Percentage of Customers Buy From the First Responder." (Lead Connect)

35-50%

Of SL digital leads are never even responded to.



A DAY IN THE LIFE OF A SALESPERSON

Salespeople spend just one-third of their day actually talking to prospects.



Building a Follow-Up Process

Create a SLA Between Sales & Marketing

Getting Marketing and Sales to Work Together

In order to build an effective lead response system for the digital age you will need to get your marketing and sales teams on the same page and working together. Long gone are the days when each department operated independently of each other. According to Hubspot 57% of the journey is complete before a buyer interacts with a sales rep. This means that the lines between sales and marketing are becoming more blurred than ever before.

10_x

10X decrease in contact rate after the first 5 minutes.

46hrs

Calls made within one minute more than double the contact rate of waiting the industry of 46 hours to follow up.

27%

Research by InsideSales.com showed only 27% of leads ever get contacted.



In this chapter, we will take a look at how you can get your marketing and sales teams on the same page and working towards the same goals. These techniques will provide you with:

- The “**who**” of what a high priority lead is
- The “**when**” of timing the transfer of a lead from marketing to sales
- And the “**how**” for managing the entire process.

For some smaller Senior Living companies, marketing and sales are one in the same, due to limited budgets or staffing. Individual stakeholders may be performing duties across both departments. Whatever the structure is at your company, however, all that is to follow remains the same: You need a clear vision of your goals, well-defined criteria for leads, and strict efficiencies in place for funneling your leads down the pipeline and through the extensive Senior Living follow-up process.

Developing a Service Level Agreement (SLA)

Much of the disconnect that happens in the passing of leads from Sales to Marketing occurs because each department has its own agenda and separate metrics by which they gauge success. A high-level goal unifying both departments should be clear: increasing revenue. This goal, however, is often lost in the shuffle.

A way to address this is by developing a clearly delineated Service Level Agreement that defines how each department can collaborate and align departmental KPIs in pursuit of the shared goal of generating revenue. Both Sales and Marketing also need to create consensus on buyer personas and develop a comprehensive profile of your ideal customer. What will result from this, too, will be enhanced clarity on exactly what qualifies as a lead. Both departments should, as a result of developing an SLA and an ICP (Ideal Customer Profile), also get a better understanding of the type of prospect they're targeting and what the other team is responsible for.



The optimal number of email messages is five.



93% of all converted leads are reached by the sixth call attempt.



50% of sales happen after the fifth touch.

Determining What Makes an SQL

An SLA serves as a roadmap so both teams understand when a marketing lead should be passed off to a sales director (ie a “SQL” or Sales Qualified Lead) for follow-up OR when a lead isn’t quite ready and should continue being nurtured through marketing automation.

Defining these criteria is important so that you don’t contact a new lead too quickly and run the risk of losing the prospect. If, for example, a site visitor running research on senior living downloads a brochure developed by your company, this means they are still an MQL and not yet an SQL, whereas filling out a contact form that “requests a tour” would clearly define them as an SQL. Determining exactly how to determine if a lead is “sales qualified” for your organization will require some internal discussion from both sales and marketing. If a website visitor downloads a brochure or a “Get Started with Senior Living” E-book – are they sales-qualified? Probably not. But if that same visitor has multiple visits and downloads and indicates they’re looking to move-in to a community within the next 3-6 months – then they should probably be contacted immediately by a sales rep. The criteria of if and when a lead should be deemed to be an “SQL” and be removed from the marketing campaign and passed to sales is critically important. It’s both important to define and important that both departments agree on the definition. The definition can always change over time (and should as your process gets more sophisticated) but it’s very important to have some sort of definition to start with.

What you can see from this is that detail is essential in developing your SLA. Don’t be satisfied with high-level content that sounds more like a mission statement than a Sales and marketing SLA. Define all potential “SQL Actions” in great detail. Identify any known obstacles for leads passing from one stage to the next, and determine exactly when and how a lead will get passed from marketing to sales. Doing this work up front will ensure there’s no leaks in your pipeline that might result in dropped leads.

How & When to Pass the Lead To Sales

Once you've determined the criteria for WHEN a lead becomes "sales qualified" you need to identify HOW it will be passed off to sales. This could be in the form of an automated email, text, or even physical notification. However you choose to do it is up to you but it's important to have it clearly defined. For our clients we typically send an automated email which lets the sales team know to follow up immediately. It also automatically unenrolls the prospect from any lead nurturing campaigns that they may be enrolled in. While physically telling your sales team that a lead is ready for them to call them is effective, we strongly recommend that you mark electronically in your CRM that the lead is now an SQL. This will allow you track the conversion rate of lead-to-SQL and help your marketing team know how well they're doing at qualifying leads. This in turn will give them a feedback loop of data to continually tweak and improve their marketing campaigns. You can see how important it is that both departments are on the same page!

Another important component of a good service level agreement is that it provides transparency on the high-level goals of each department. Tunnel vision happens easily, and not keeping the other department's KPIs or structure in mind is one of the quickest ways to create interdepartmental friction. Make sure to include clear summaries of goals and KPI's for each department so that there's total transparency between each department. By clearly stating the high-level objectives of each department your staff will better understand each other and have a chance to find "win wins" when working together.





Maintaining an Ongoing Interdepartmental Dialogue

A great way to improve these practices and refine them so that they result in the most conversions is to make sure that Marketing and Sales maintain an ongoing conversation about the inbound lead follow-up process. As we touched on in the discussion around developing an SLA, tunnel vision in either department doesn't benefit the company as a whole, while endless focus on satisfying department-specific KPIs prevents each department from remembering the holistic process.

Conduct weekly meetings during which your teams review leads and campaigns for the last week. Which campaigns were the most relevant? Were leads prioritized by Marketing and sent through to Sales resulting in conversions? Track the pipeline from start to finish. Allow Sales to inform Marketing, and vice versa. An ongoing loop of constructive feedback is the ultimate way to refine your inbound lead pipeline and meet the high-level goal of increasing revenue across your enterprise.

During these meetings, you also need to focus on how leads are qualified. Now that you have a lead routing and ranking system that you can implement, stick with it and ask for feedback. Is marketing passing on all leads and



fomenting chaos, or are they passing on ones they think are sales qualified but really aren't? Establish a dialogue on these processes and revisit them each week. Review specific examples from the week and see how many leads are getting passed back to marketing from sales for more massaging. If a lead was passed back, why was it? Ask all the stakeholders in these meetings the following:

- Do you think the number of leads being passed to sales this week were a healthy number?
- Are these leads meeting the criteria we defined for qualifying a lead as Sales ready? If they are not, where is the leak and how can we fix it?
- Is the lead scoring system actually producing SQLs that are hot and not lukewarm or stone cold? If not, what do we need to tweak in our scoring system?

Given the extended timeline it takes to convert in Senior Living, you will see dropped leads, and you will see them often. Your Sales team might touch a lead 20 times and still see no action. Frustration can cause them to just drop the opportunity. Establish an understanding between the teams about when and how leads with multiple touches can be sent back into the nurturing funnel.

Summary Service Level Agreement Checklist:

In summary, you'll want your SLA to include:

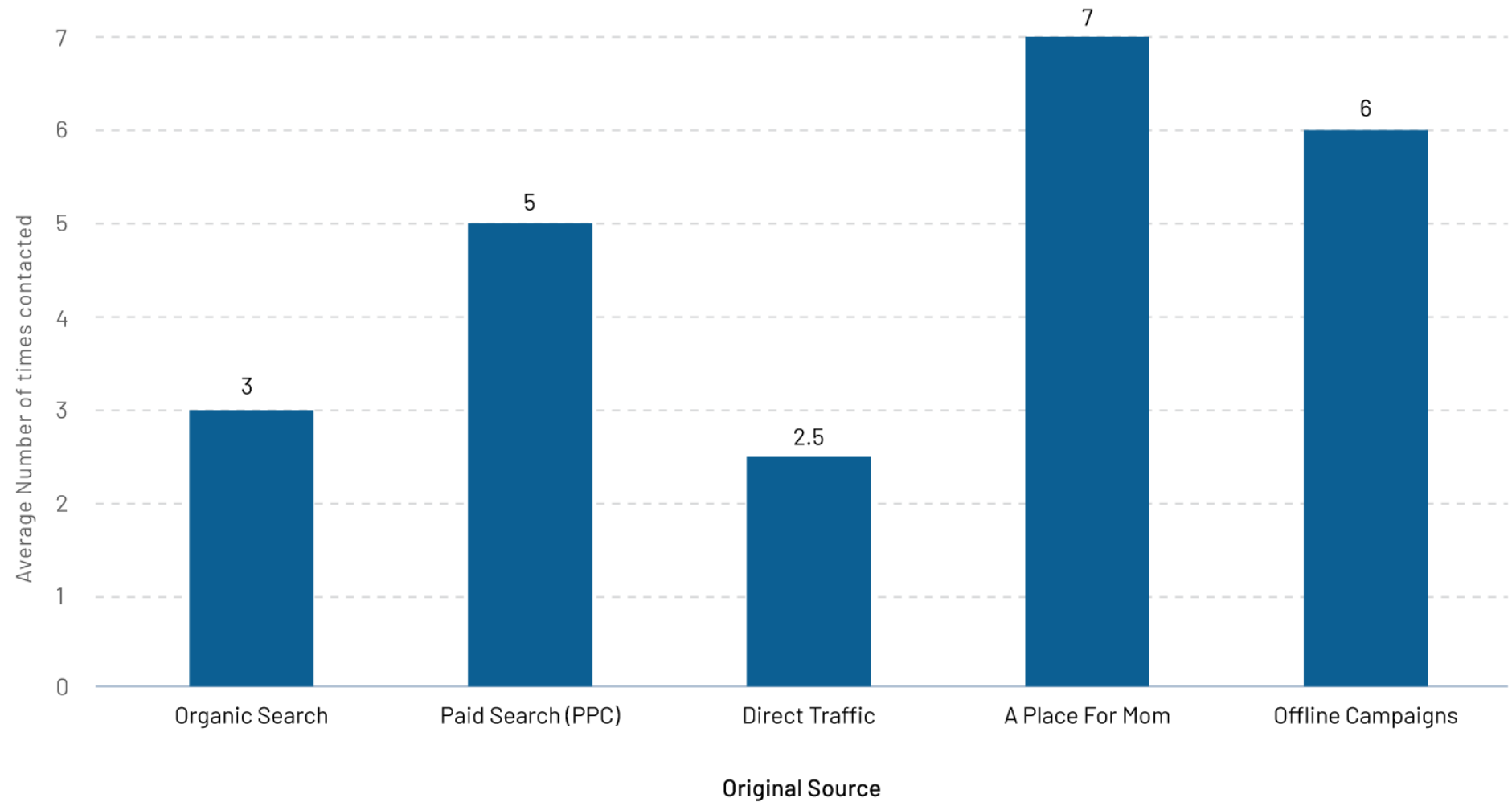
- A summary of the SLA and its purpose
- Buyer Personas and an ICP (Ideal Customer Profiles)
- Clear Definitions of the Following Lifecycle Stages:
 - A Lead,
 - An MQL
 - a SQL,
 - and a Customer.
- High-Level Marketing Goals & KPIs (For example: lead volume goals, conversion rate goals, lead qualification goals)
- High-Level Sales Goals & KPIs (For example: discovery calls booked, tours scheduled, & move-ins generated)
- What Sales Needs from Marketing to Hit their Goals
- What Marketing Needs from Sales to Hit their Goals
- Consequences of Not Achieving Goals
- Conditions Required to Revise and Develop a New SLA

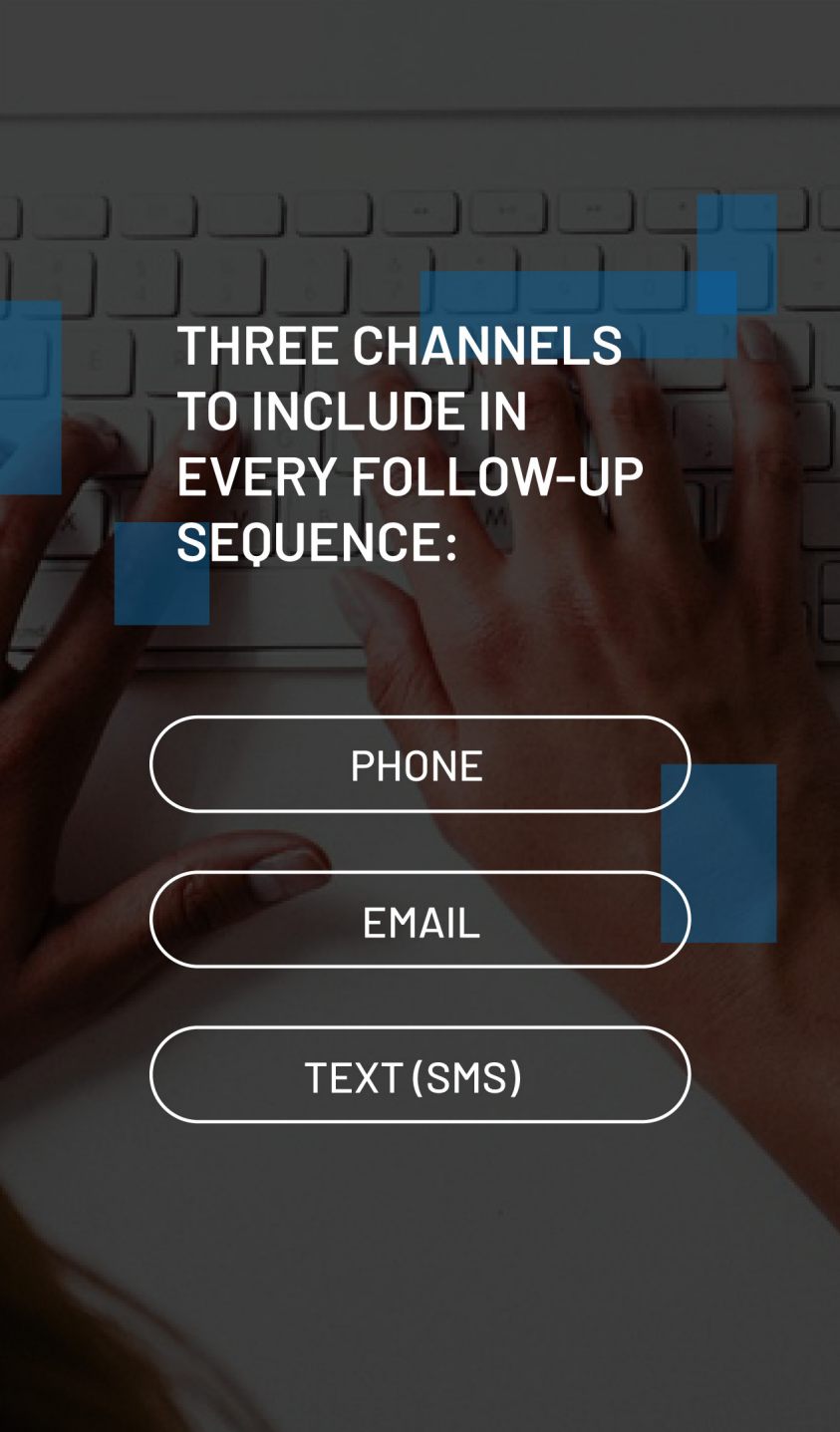


Average Touches by Source

i Date range: This year so far

● Average Number of times contacted





THREE CHANNELS TO INCLUDE IN EVERY FOLLOW-UP SEQUENCE:

PHONE

EMAIL

TEXT (SMS)

Follow-Up Schedule & Strategy:

PREPARING FOR THE LONG HAUL

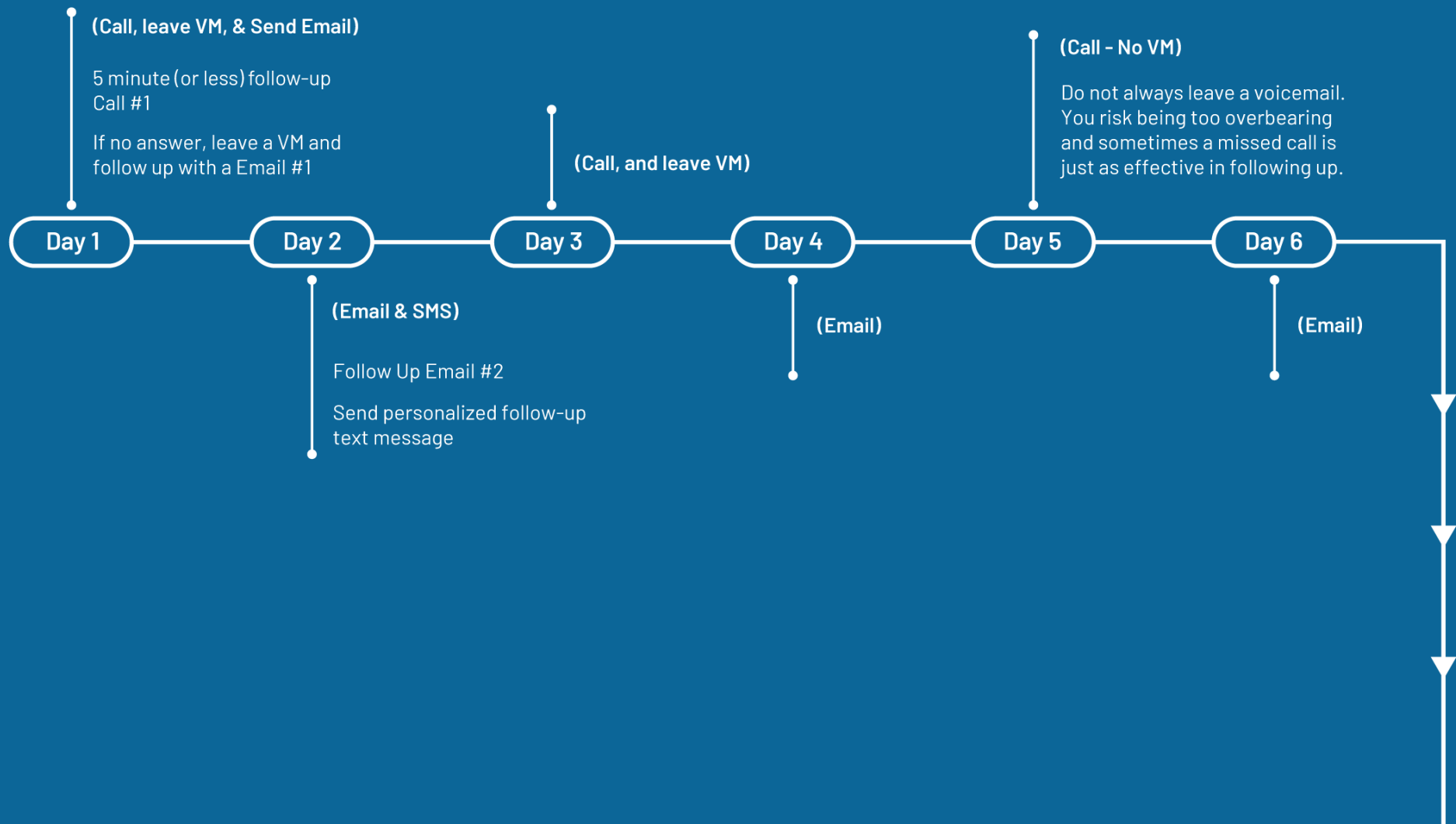
Senior living sales teams were asked: what part of the sales process gives you the most trouble? Again and again, one topic came up— follow-up.

As stated earlier the sales cycle for senior living is notoriously long. Only a bit more than 30 percent of leads in Senior Living convert within 60 days, while 40 percent take at least 3 to 6 months to make a decision. That's a long time to stay in touch and follow-up! Especially when you have new leads coming in all the time!

Building rapport and providing quality information along the way during the nurturing process can help, but it is a long process and a complex one. Follow-up is difficult at any company, however, and doubly so in Senior Living. What's more, the cost of generating leads and then managing an extended follow-up process with multiple touches can be extremely time-consuming and burdensome. When you add "lead follow-up" to the huge list of other responsibilities of a senior living sales director you can start to see what a bottleneck this problem is. That's why leveraging automation and creating a standardized follow-up process for leads is so critical in senior living. In the following chapters, we'll discuss how you can introduce and enhance automation in your follow-up processes so that everyone works better as a team.

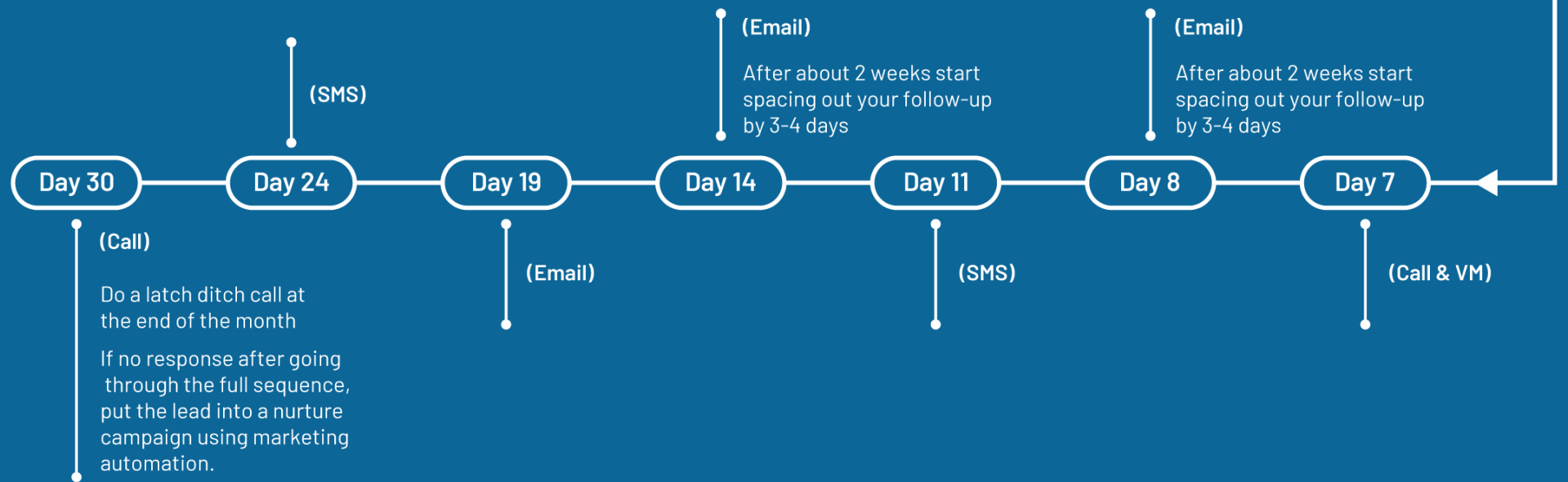
FOLLOW-UP SEQUENCE

Goal: Get lead on the phone, qualify, and book the next appointment/tour.



FOLLOW-UP SEQUENCE

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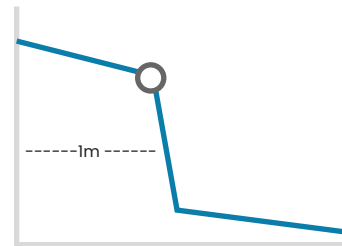


RESPONSE TIME

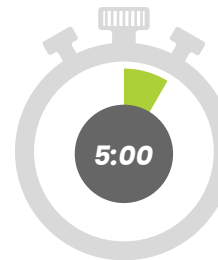
Lead response time is critical at any business. In fact it's even been stated that "35-50 percent of customers buy from the first responder." The longer you take to respond, the less likely you are to make contact with and convert that prospect. In Senior Living, it's no different. And with the average cost per lead being so high (roughly \$150 per lead) you can see why response time is even more important.

To drive home the importance of lead response time here's some more statistics:

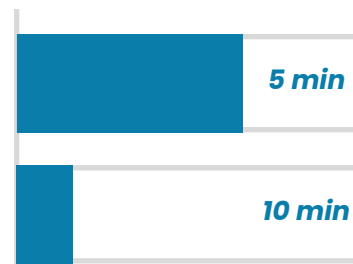
- 35-50% of sales go to the first responder
- You're 21x more likely to qualify your lead within the first 30 minutes.
- You're 391X more likely to create a customer by responding in the first minute
- Just 1% of companies respond to leads within 5 minutes
- Only 7% of companies respond within the first 30 minutes
- The average response time is around 42 hours
- 55% of companies take more than 5 days to respond!



Sales conversions are 391% higher when inbound leads are contacted within the same minutes of requesting a demo



By studying 60,000 calls, Hubspot found that calling leads within 5 minutes produced a 50% contact rate

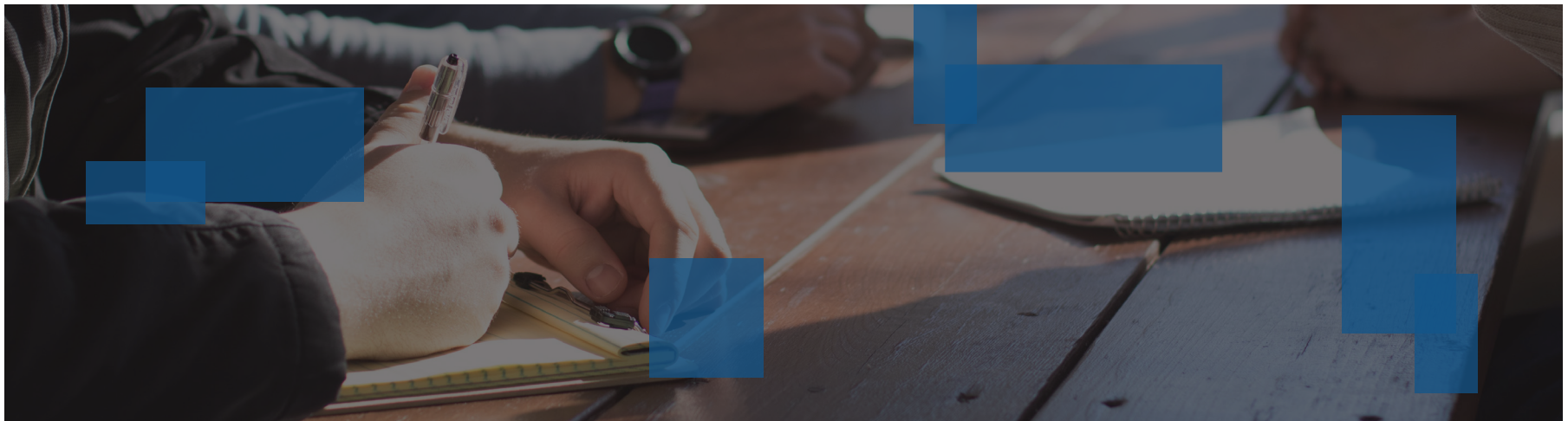


There is an 80% decrease in the odds of qualifying a lead when you respond in 10 minutes vs 5

And while these statistics are from multi-industry studies, what we've found is that the results are actually worse in senior housing. From the data that we've uncovered from running secret shop studies on over 50 senior living communities we've found that the following data on response times in senior living:

- The average response time is 48 hours
- Less than 5% respond within 30-minutes
- Almost 50% of companies DON'T RESPOND at ALL

As we'll cover later, response time is an area that needs to be tackled with technology. In order to know the moment a new SQL is created you'll need to create automated alerts for your sales staff (or whoever is in charge of lead response). You cannot leave this up to chance or when you just happen to check your inbox for a new lead lead. In addition to all important first outreach via phone, you can also use automation to send texts and emails instantly. Although this does not substitute the need for the fast phone call (when dealing with an SQL), it does serve a failsafe way to ensure that the prospect is responded to in some fashion immediately.



FREQUENCY:

The next determining factor in the success of your follow-up program is frequency and cadence. The stats around frequency are just as compelling.

- It takes an average of 8 touches to reach a prospect.
- The average sales rep only makes 2 attempts to reach a prospect
- Over 50% of sales happen AFTER the 5th follow-up touch
- 44% of salespeople give up after one follow-up

These stats are fairly consistent with what we've seen in senior living. The average senior living rep only follows up between 1-2 times before giving up. However it takes approximately 6 touches to reach each prospect.

The amount of frequency in your follow-up can be a delicate balance, especially in a purchase decision as education-heavy and emotional as senior living. Too little contact, and your lead won't feel as if your organization is reliable; too much, and they will find you aggravating, as they would with any B2C outreach that goes too far.

What to do then? Aim to structure a follow-up schedule that is consistent enough to keep your community at the top of your prospect's mind, while not overstepping the boundaries. As we will discuss in greater detail later further on, not overstepping is as much about the how as it is about the when. For the sake of this discussion with regards to timing, structure a schedule that involves no more than 7 to 10 touches in its first stages. Also plan for an adequate amount of time between each touch. For Senior Living, 24 hours is a good waiting period, since it serves as a middle ground between too eager and lackadaisical. If a lead has gone a long way through

your funnel without replying, you can enroll them back in a slow drip marketing automation campaign that's spaced out by weeks at a time. However for SQL response you'll want to shoot for 7-10 touches within the first 10 days.

Also tone is everything in these responses (as we'll showcase later in our email templates). Professional persistence always wins out over unprofessional insistence. Remain measured, professional, and helpful in all communications. Professional persistence, more often than not, will result in leads keeping you in mind and on deck until they have the time to respond. Getting the right cadence means using common sense as your high-level guide and intuition at the individual lead level.



Finally, make sure that you have a Subject line on your email that prospects will actually open and read. Unlike marketing emails, sales emails should be simple and conversational. Remember, you're responding to them reaching out to you. Typically there will be a very specific question you're answering and will not require much embellishment. Given the nature and importance of Senior Care, stay away from tricks and anything too cute, such as emojis, despite whatever statistics you may hear about how they increase open rates..

Tips for Structuring Emails

- Limit Subject lines to no more than 4 words
- Keep emails to no more than 125 to 150 words
- Include questions to trigger replies

While every email should be tailored to that particular prospect and their questions, the following are templates to use as starting points in developing your email responses:

Leveraging Multiple Channels

There are three main channels that have emerged as the most vital for a B2C follow-up process. Those are phone, email, and SMS or text message. When used correctly, having multiple outreach channels can make a massive difference in the success of your lead response program. Consider some of the following statistics:

- 80% of calls go to voicemail, and 90% of first-time voicemails are never returned
- SDRs that leverage a triple touch have 28% better lead qualification than SDRs that use just phone and email
- SMS text messages have a 98% open rate, making it a powerful follow-up tactic to combine with email, which has a 22% open rate.

In Senior Living, when you're dealing with a newly created SQL, phone calls are particularly crucial. There's a 50% chance that you'll contact the lead on the first call if your team calls within 5 minutes. It's the most direct way to make connection and, if done correctly, can be the most effective. However you will want to pair your email and phone calls up so that they work together as a sort of one-two punch. Studies show that leads that receive email follow-ups in between phone calls are 16 percent more likely to answer the phone next time you call.

We also suggest you consider incorporating text messages into your lead response system. Many studies have shown the effectiveness of texts and the data can't be ignored. By sending the appropriate text at the right time. SMS has a whopping 98% open rate (vs 22% for email) and a 45% response rate (vs just 8% for email). Since making contact with your SQL should be the goal of your lead response system, it makes SMS a no-brainer to incorporate into your process.

Your main focus, however, should be on the phone. This is your vital connection to the senior living prospect. To this end, you want to make getting in touch with you on the phone as easy as possible. This may seem like a



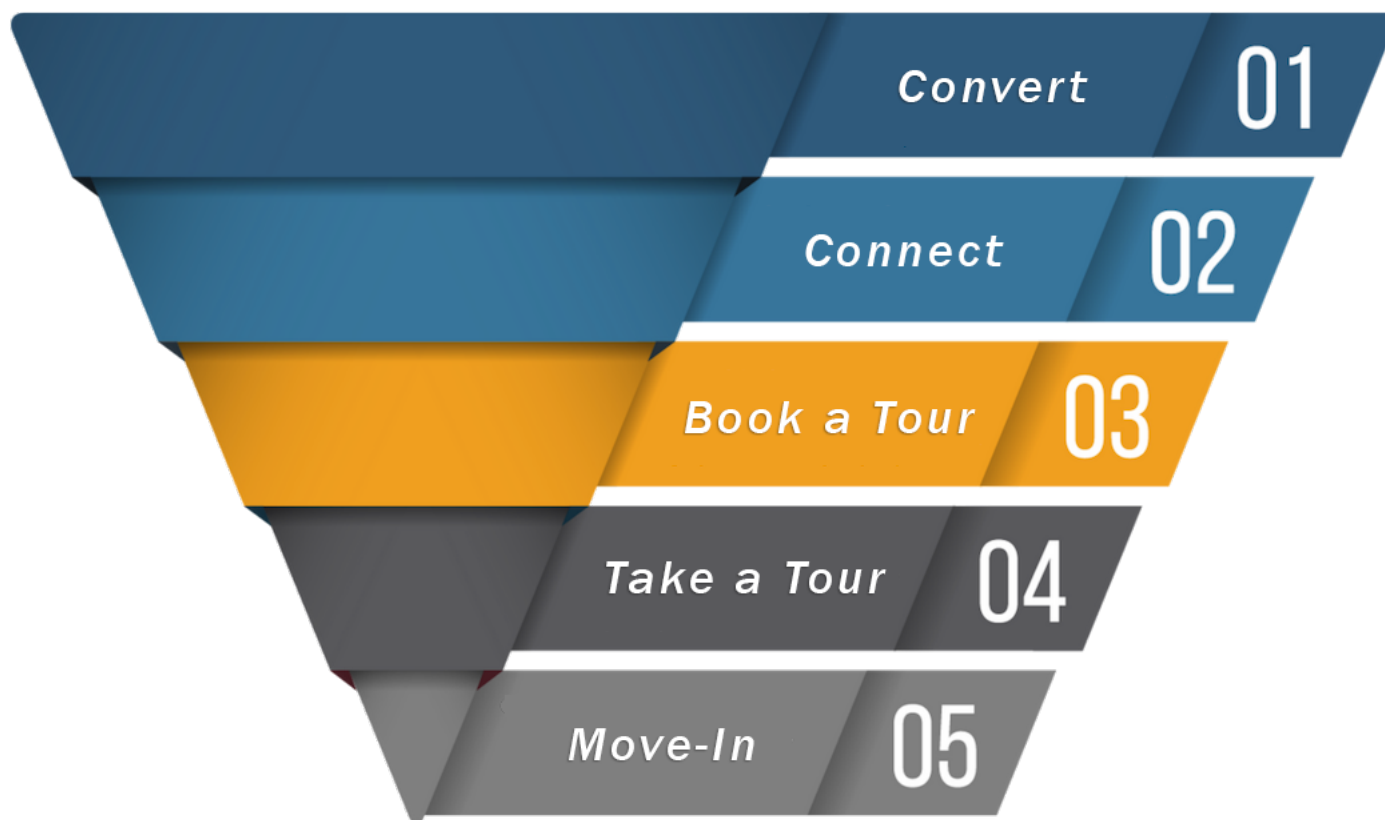
no-brainer to you but make sure your phone number is listed clearly on both your website and your emails. Consider the generation you are dealing with and don't miss out on any opportunity for your potential customer to make that phone call. Integrate call options onto all web forms, include call extensions in your ads, and make sure that you have multiple call CTAs across your website.

You'll also want to consider using a meeting link that syncs with your work calendar so that your prospects can book a call-back with you. Sending a link to your calendar makes it super easy for them to book a call at a time that works best for them.

Once those calls are coming in, you want to track your calls from the very first marketing source all the way through to sales. This will benefit you as marketing and sales try to come together to collaborate. If you are (hopefully) leveraging a CRM in-house, you will want to integrate all call data with that tool so that you can get a high-level view of the buyer's journey as it progresses. As we will touch on later, there is tech that can help you parse and track phone conversations as well. Tools such as call analytics can help ensure that you are providing your leads with the most personalized experience possible, an essential part of the Senior Living follow-up process.

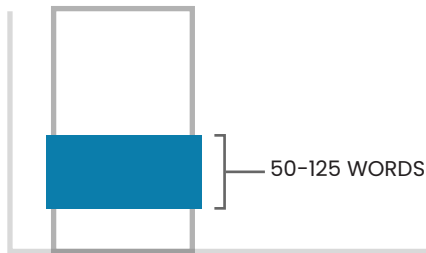
You also need to analyze your phone protocols to determine how many calls are being dropped or left unanswered at your communities, especially if you operate several locations. In a buyer's journey as high stakes as Senior Living, dropped or unanswered calls would almost certainly result in a higher rate of abandons. Also, look at which type of caller converted, which of your sales reps took that call, and determine which scripts or conversations are resulting in the highest number of in-person tours.

As you proceed, continue to assess and refine. All of these touches provide essential data that you can then use to test and scale your phone protocols so that they convert more readily.

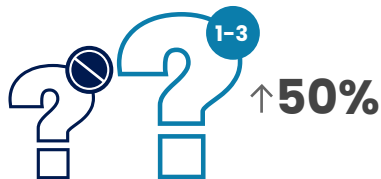


SUBJECT one, two, three, four ✓

Subject lines with 3-4 words have the best response rate



Keep it short. A 25-word email is roughly as effective as a 2000-word one. Best practice is between 50 and 125 words.



Emails that contain 1-3 questions are 50% likelier to get replies than emails without any questions.

What to Say



EMAIL:

If you've done your due diligence up until now, your Marketing and Sales teams are communicating effectively on priorities and seamlessly passing leads down the funnel. Everyone is on top of their response times, too. Why aren't the conversions happening?

Seamless processes are only half the battle. You now need to concentrate on nuance in each touch, establishing rapport and saying the right thing at the right moment.

In developing your follow-up emails, make sure that you clarify why you are reaching out and how you knew to contact the lead. Make sure to reference their initial form submission or question that they remember the fact that they reached out to you, and this is NOT a spam or marketing email. Each email you send should have only one CTA (Call to Action), and it should be concise and to the point. You will want to summarize, too, how your Senior Living community addresses the lead's pain points and/or questions from their initial form submission or contact message.

Follow-Up Email #1 (Post-Call)

Recipients

Voicemail from [Contact: Community Name]

Hi [Contact: First Name],

I just left you a voicemail. Thanks for your interest in our community!

Please [click here to schedule a time for me to call you](#) or let me know what time you would be available to chat.

Looking forward to speaking with you,

Send



Follow-Up Email (Tour Request)

Recipients

Tour of [Community Name]

Hi [Contact: First Name],

Thanks for your request to take a tour of [Community Name]

I'd to get in touch to confirm the details of your tour. Please let me know when you're available to talk or simply [click here to schedule a time for me to call you](#).

Looking forward to speaking with you,

Send



Follow-Up Email (Referral Partners)

Recipients

Follow-Up from your call with [Contact: Family Advisor]

Hi [Contact: First Name],

I just left you a voicemail a moment ago. I saw that you spoke with [Contact: Family Advisor] at a Place for Mom and they asked us for help with finding a community for [Contact: Resident Name].

I'd like to schedule a call so I can learn how best to help you. o see how we could best help. to get in touch to confirm the details of your tour.

Please [click here to schedule a time for me to call you](#).

Looking forward to speaking with you,

Send



More Info About Our Community

Recipients

More Information about [Community Name]

Hi [Contact: First Name],

Great speaking with you on the phone earlier today. Below is the information about our community that I promised, as well as a link so that you can get back in touch with me when you're ready to schedule a tour!

- [Pricing and Floor Plans](#)
- [Visit Our Facebook Page](#)
- [Take a Virtual Tour](#)

Thanks again,

Ps. To get back in touch just [click here to setup a time to chat](#).

Send





PHONE:

Getting somebody on the phone is going to be your main goal in your lead response process. In order to properly qualify them and move them forward in your sales process, or disqualify them and unroll them from your process, you will ultimately need to speak with somebody on the phone. Because this is such a critical part of the process it's vitally important to be prepared with what you're going to say. You don't want to leave this interaction up to chance after all the hard work you've done to get them on the phone.

As stated above your main goal is 1) make contact with the prospect and then 2) answer any questions they have and 3) either qualify or disqualify them. In order to do this you'll need to know the exact responses that would signify that somebody is qualified for your community and is worthy of talking directly to a sales director for a deeper discovery call. Since every senior living community has slightly different criteria on who's a fit for their community we're going to assume that this initial contact is made a BDR (business development representative) for your community. The goal of a BDR is the same as stated above: make contact, qualify, and setup the next appointment (or tour) for the sales director so they can take it from there.

Aside from the actual things you'll be saying you want to ensure that your tone is very patient and understanding. At this inbound BDR role you'll have many interactions where the prospect won't remember they contacted you, won't be able to hear you very well, or they will be easily frustrated because they're getting inundated with calls from other communities (as they will if they lead came from A Place for Mom). This is why you need patient and understanding reps on the phones for this first contact. Patience and empathy will be major traits to look for when hiring for this position internally.

Below are samples of potential first call scripts:

Request Submitted, First Follow-Up Call

Hello may I speak to [Contact: First Name]?

It's [Rep Name] from [Community Name]. If you recall, you filled out a form online about [our community name]? (pause)

Do you have a quick minute to talk?

The reason why I'm calling is because I wanted to help with your recent inquiry. I would love to point you in the right direction. Before doing so, do you mind if I ask you a few quick questions so I know best how to assist you?

1. What is most important to you in selecting a community?
2. What prompted your search for a senior living community?
3. How soon are you looking to make a move?

Thanks for sharing that, {{first_name}}. So if I understand right... [restate what you have learned back to the lead] and you are looking for [memory care/assisted living], is that right?

Request Submitted, First VM

Hi [Contact: First Name]

It's [Rep Name] from [Community Name]. I'm calling to follow-up with your request you submitted on our website about [insert request]

I'd love to get you on the phone to chat about that. Please give me a call back at [insert phone number]. I will also follow-up momentarily with an email and a link to me calendar if you want to schedule a call with me at a time that works for you.

Have a great day and looking forward to speaking with you!





TEXT/SMS:

While using SMS is becoming more and more commonplace in sales organizations it's still not very common in senior living. And for good reason. Many, if not most, seniors still do not think of texting as a primary mode of communication the way younger generations do. If you're going to use text in your lead response process it has to be done correctly and not come off as intrusive. For our clients we typically will only include text in the follow-up once we've determined that the person is the "adult child" persona, and will not use it for the senior themselves. We've found that using it for the adult child, especially in combination with sharing a meeting link that makes it easy for them to book a call, has been very effective in getting that first critical phone interaction.

Similar to email, text typically only works at scale when you're able to leverage technology to do it automatically. Having your inbound sales reps (BDRs) type out texts and emails manually each time is going to be much too cumbersome and they will quickly become overloaded. When taking into account that the average lead needs to be contacted 6-10 times you can see why leveraging technology is essential to incorporate these methods effectively.

Below are screenshots of a few sample texts that you could be sending as part of your follow-up process:

Example Texts:

1st Response:

Short and to the point with
The goal of booking a call.

Hi Christina! I got your inquiry about [Community Name]. I'm excited to touch base. What day/time works best for you this week?

Delivered

After initial inquiry and phone/email follow-up:

Make it easy to book a time
That works for them

Hi Christina, I'm reaching out because you inquired about our senior living community. Feel free to call me back on this number or schedule a time for me to call you here: [insert calendar link]

Delivered

After numerous Attempts:

The tone should be
persistent but always helpful.

Hi Christina, It's Michelle from [Community Name]. I don't mean to be a pest but I wanted to check back in. Any questions about our community that I can help answer?

Delivered

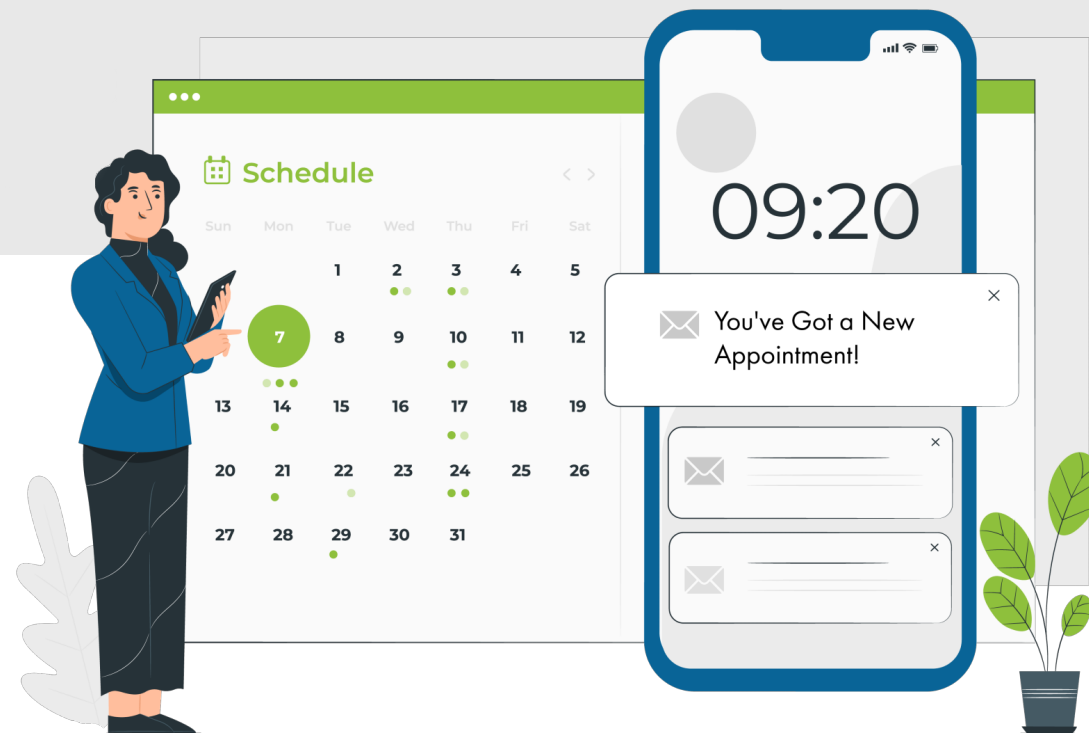
Technology to Make it Easier

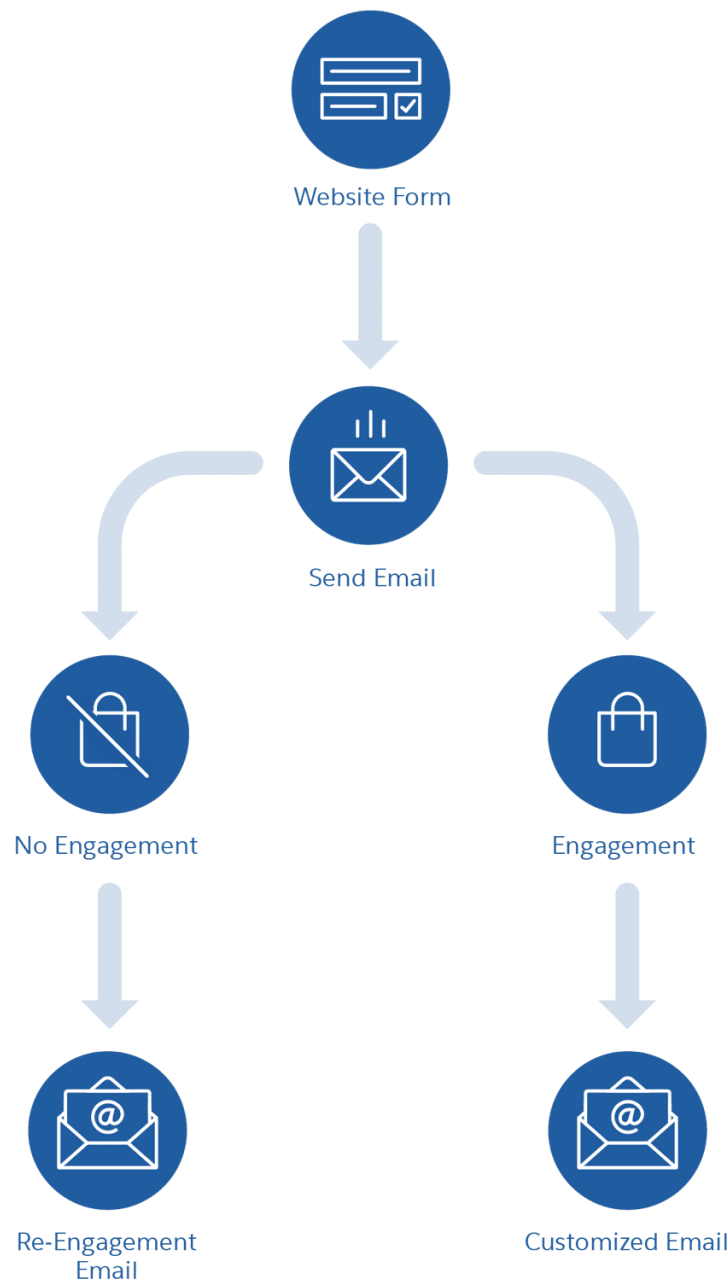
An enormous asset in doing business in the digital age is, of course, the wealth of technology available that can enhance and streamline your operations. Utilizing the correct tools in your lead response process will be critical. To be honest, it would be very hard to do this job effectively without them. The main tools that you'll be wanting to utilize in your lead response process will include:

- Marketing Automation Tools
- Customer Relationship Management (CRM) Tools
- Sales Enablement Software
- Chatbots

We will take a look at each in turn during this chapter, considering how they can further facilitate efficiencies within the lead pipeline. These tools allow you to do anything from automating emails to enrich critical lead data.

With the right technology, you will be able to expand on the concepts we have already discussed and enable the seamless sharing of data and transfer of leads throughout your company.





Marketing Automation

Marketing automation is a relative newcomer to the Senior space, but is catching on at many companies. Smaller companies have felt they didn't need it in the past, while multi-location enterprises have had a hard time making it work for them efficiently.

LEAD NURTURING:

Marketing automation does make things easier, however. And it lends itself perfectly to the senior living industry in many ways. For example, because the buyer's journey is so long (around 4 months as we discussed earlier), marketing automation can be used to stay in touch with leads over time. If for example you have a lead that's interested in memory care, you can setup an automated series of emails to be delivered on the topic of memory care without any effort from your staff. In this case you would enroll that prospect in a "lead nurturing campaign" about memory care. You can set the campaign to send out an email each week with educational information about the subject of memory care. By staying top of mind and offering educational resources to the prospect they will remember you when it's time to book a tour.

LEAD SCORING & LEAD ROUTING:

In addition to creating personalized outreach to your prospect, marketing automation can be very helpful internally as well. You can use marketing automation to automatically set a contacts status from MQL (Marketing Qualified Lead) to SQL (Sales Qualified Lead) and then trigger an automated email to send to your sales director alerting them that a lead just became an SQL and that they should follow-up immediately. In fact, this is a huge component to why our call reps are able to respond so quickly to new SQL prospects. Without this process happening automatically there would be a huge gap in time and we'd probably not be able to reach the lead when calling them on the phone. Automated emails can be sent for a huge number of reasons. Some of the most common uses for our clients include:

- A new lead is interested in their community
- A lead just became an SQL
- Or an old lead just came back to site and we should reach back out.

Automation can also be used to group leads automatically into list for specific communities. This can be very useful to get an accurate count of how many new leads each location is getting. These "smart" lists can then be used to create reports by location or to send marketing emails that are specific to that community.

Marketing automation has almost too many use cases to cover fully in one e-book. Just know that if you're not currently using a marketing tool that it's a potential gamechanger when it comes to responding quickly to new leads and staying in touch with leads over time. What's more, a marketing automation solution can automate the transmission of helpful data internally between sales and marketing at any stage in the process.



CRM (Customer Relationship Management)

If you don't already use a CRM it's pretty certain that you've at least heard of this tool. A customer relationship management software or "CRM" has started to become commonplace in most organizations. The vast majority of enterprises in the Senior Living space have invested in a CRM, with 60% of Senior Living companies planning on expanding their stake in this essential solution in the near future.

LEAD MANAGEMENT:

Your CRM is, in essence, the storage space where you keep all essential data on your leads and converted customers. It allows you to manage leads in enormous quantities across different stages of the pipeline and ensure that you communicate effectively and never redundantly with a lead. With regards to in-house operations and the logistics of passing along inbound leads, a CRM allows all relevant stakeholders to stay on top of tasks and access and share notes on particular prospects.

From another perspective, your CRM is a midpoint between your Marketing Automation tools and any sales engagement software your sales reps are using. In this pivotal role, it helps to ensure that the process you began when you developed your SLA continues working seamlessly to this day. A CRM stores all relevant conversations and activities related to leads so that no lead ever has to have the same conversation twice with members of your organization. The simple alleviation of this small bit of friction adds enormous value to your inbound lead process.

Forecasting/Reporting:

There are huge benefits to having lot of customer data in one place. A major one being that you can analyze the past and make predictions about the future. Once you have an accurate idea of what percentage of your leads actually become customers, you'll be able to make predictions about future sales and forecast what needs to be done. Once you have 2-3 years of data you'll be able to see clear trends based on time of year also and plan accordingly. Knowing your numbers is extremely helpful when trying to predict the impact of other efforts like lead generation. If you know how many leads will become customers it will be much easier to predict what effect a lead gen campaign could have on your bottom line.



Other Benefits/Features:

There are any number of tasks you can undertake with a full-feature CRM, but some to consider in the Senior Living space include:

- ✓ **Keeping a database of all prospects and customers:** Your CRM is a living database of all your prospects as well as existing customers. It allows your team to have the same views and access to see every interaction that a prospect has had with your company. Th
- ✓ **Creating a fully transparent sales process:** In most CRMs you can customize your deal stages to fit your industry or organization. Then you can share this information with your team so there's full transparency into where different leads are at in the sales process. For example, senior living deal stages might include: Lead, Tour-Booked, Tour Completed, Deposit Received, Move-In. By moving a prospect through each stage on a Kanban board you can clearly visualize which step a prospect is at.
- ✓ **Analyzing customer trends and making recommendations.** By keeping all your customers inside your CRM you'll be able to see what actions they took on the road to becoming a resident. This is hugely helpful in seeing what pages on the site they viewed, what content they downloaded, and who or what they interacted with on the road to becoming a resident. This allows both sales AND marketing to see first-hand which activities they should be doubling down on as they know that they will result in more move-ins.

As with marketing automation these are just a few of the benefits that come from using a CRM. In today's sales environment it will be extremely hard to compete without both of these tools. Not only having both tools, but making sure that each integrates with each other and that marketing and sales efforts are coordinated in tandem.

Sales Engagement Platform

A sales engagement platform is a relative newcomer to the space. While this often is mentioned in the same sentence as a CRM it's technically a very different thing. Think of a sales engagement platform as marketing automation except for sales. One of these platforms will allow you to take the leads from your CRM and create automated followup processes for your sales reps.

FOLLOW-UP AUTOMATION:

Unlike marketing automation which nurtures leads over time in hope of qualifying them, sales automation helps your reps automate the follow-up and get in touch with prospects. Sales engagement platforms help you create automated sales emails, create tasks for your sales reps automatically in the CRM, and basically help your sales reps perform better. Supplementary, sales-friendly features that can add value to a Sales Engagement Platform include sending SMS straight from the platform, or integrating your phone system to track and log calls.

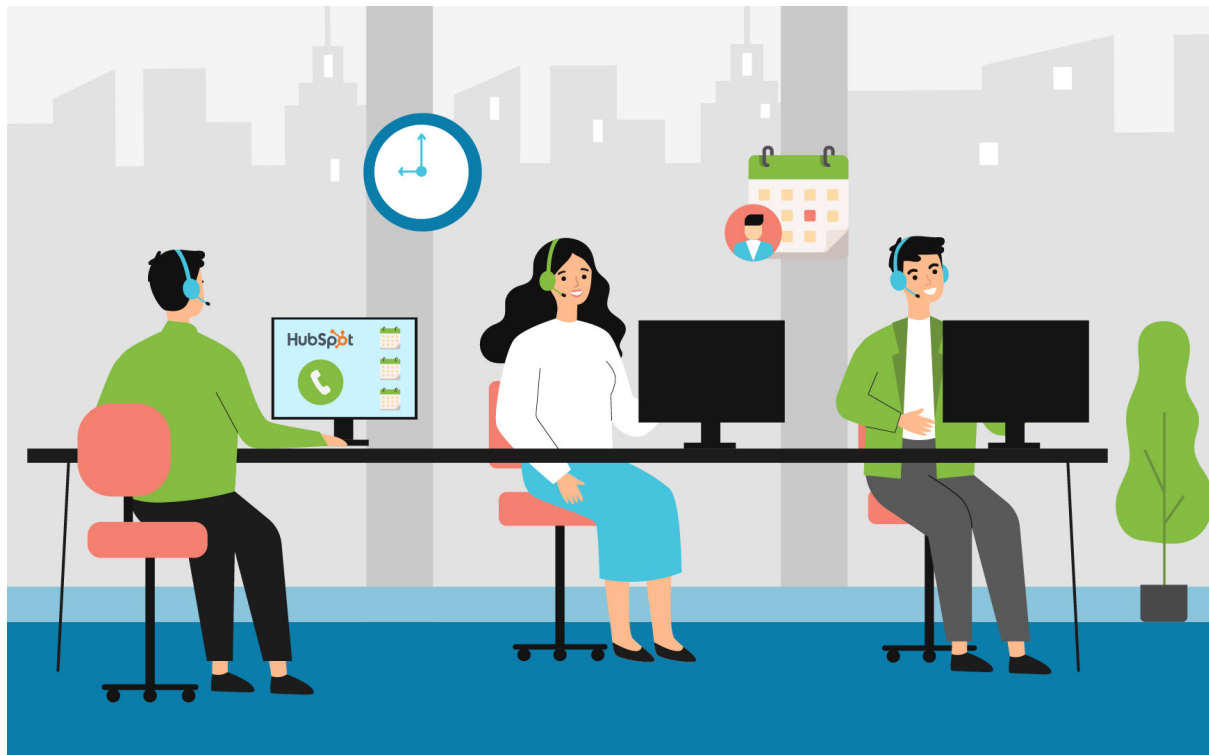
CALL TRACKING, INTEGRATION, AND AI

Yes, your sales reps can just pick up a phone and make a call. Being able to track, report, and even record calls via software, however, can make your inbound lead management that much more efficient. Today's sales dialers integrate with your CRM or Sales Engagement platform or,

as an alternative, you can actually seek out CRMs and SE platforms that have integrated call management features. Recording calls can be a particularly effective tool at your weekly stand-up meetings, providing critical insights into what worked and what didn't work in your sales scripts and phone conversations. There are also multiple AI solutions that not only take notes for your sales reps during conversations, but also set up reminders and structure next steps in the sales cycle based on those notes. Your sales rep can then review and schedule next steps on a daily or weekly basis and even take note of high-risk mentions.

Solutions

In our opinion lead response and lead management is a major problem that the senior housing industry faces. And if you have not identified it as a major problem in your organization, you most likely will soon. As more and more leads come from digital sources your sales directors will start to feel more and more overwhelmed and spread thin. The job of responding quickly (within 30 minutes) and with 8-10 touches to simply get ahold of the prospect is a completely new problem. Think about it, digital leads were not an issue 10 years ago. Up until now digital lead response was an afterthought. However now it's becoming a necessity and will only become more and more important in the years to come.



You first thought might be to assign the task of lead response to your existing staff, most likely your sales department. However we believe what you would soon find is that this just simply isn't a viable solution. Your sales director's plates are already full. Their days currently consist of giving tours, entering data into a CRM, creating sales and census reports, hosting community events, running promotions, handling walk-ins, and a whole range of other responsibilities.

Adding instant (within 5-30 min) lead response, and 8-10 touch follow up and documentation to their plates is simply not an option. You can try, but immediately you will either be hit with backlash from your staff or be hit with the realization that their current bandwidth simply doesn't allow them to do lead response effectively.

Once you've come to the conclusion that 1) lead response and making contact with digital or inbound leads is a necessary new sales role at your organization and 2) that your current staff doesn't have the bandwidth to do it effectively, then you are left with 2 options.

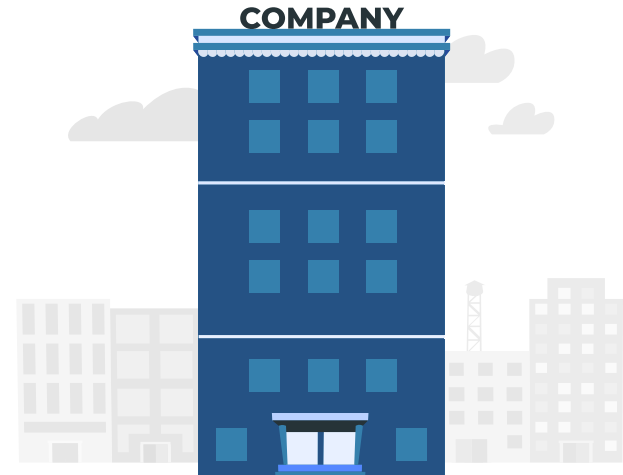
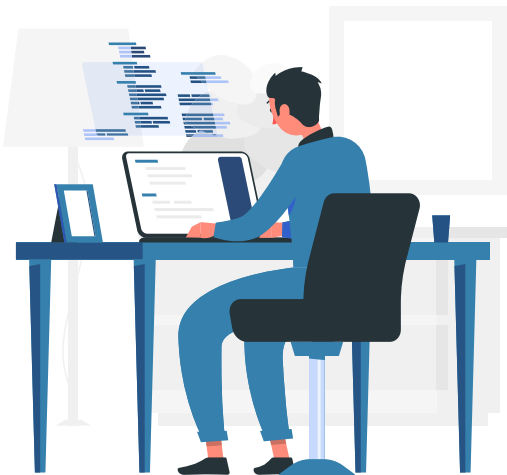
01

Hire a completely new person(s) and create an in-house contact center team

or

02

Outsource this very specific role to a third party company.



In this chapter we're going to breakdown both options and discuss what's necessary in each case.



Creating an In-House Contact Center Team

The first solution is to hire specifically for this role and build a small internal team yourself. While this solution seems the simplest at the start there's a few things to consider. The first role you will need to hire for is an "inbound BDR" or inbound business development representative. Other names for this role are "SDR" or sales development rep or "inside sales representative." Whatever you choose to call it the responsibility of this position remains the same. Their role is to generate qualified sales prospects and setup a time for the prospect to meet or speak with a more senior member of the sales team (usually the sales director at your community). The more aptly named "inbound BDR" refers more specifically to handling the inbound sales leads from the website, PPC campaigns, and from referrals sites like A Place for Mom – which would be the need in this case.

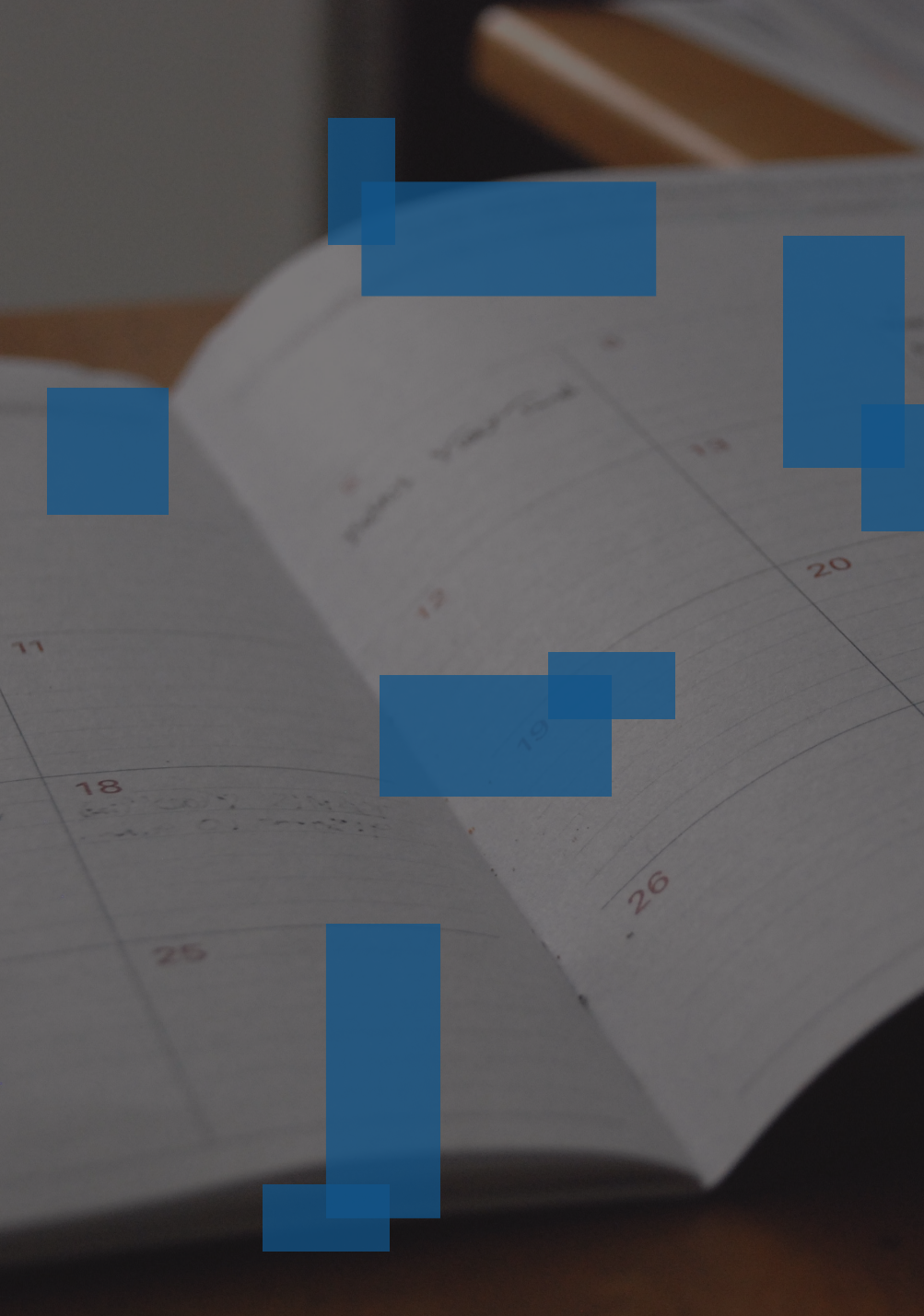


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Sales Development Representative (SDR): A type of **inside sales rep who focuses more on inbound lead qualification, moving leads into and through the **sales funnel**, and setting up sales qualified appointments.**

– LeadFuze

”



Depending on your volume of leads a single inbound BDR may not be enough. If a rep is on the phone setting an appointment, or doing one of the many follow-up touches necessary to make contact with the prospect, they may not be able to respond quickly to new leads coming in. If you're generating over 200 per month we suggest you have 2 people ready to handle inbound leads. In fact, as a rule of thumb you'll want a new BDR for every 200-300 leads you get per month. So if you get 1000 leads per month you should be prepared to have 3 people on salary to do lead response effectively. If your company continues to grow and you have 3 or more BDRs handling calls you'll then want to think about somebody to manage and train each new employee. This "contact center manager" role could be responsible for checking call quality, tracking the contact rate and number of appointments booked, running ongoing phone training for the reps, and creating reports to track team performance. With 3 BDRs and a manager you can see how quickly you will have your own internal department tasked with performing this role efficiently.

Skills, Training, and Technology:

Once you have your team assembled you'll need to make sure there are scripts and a process for handling inbound leads and calls. Ideally your staff will need to go through some sales training on the phones and have a process in place for every new lead that comes in. In addition to the phone training you'll also need to make sure your staff is trained on how to use a CRM and/or marketing automation tool. As we covered earlier, doing this task without automation and lead management tools like a CRM is almost impossible to do effectively. Making sure that your staff is trained on whatever software you choose to use will be hugely important to the success of the program.

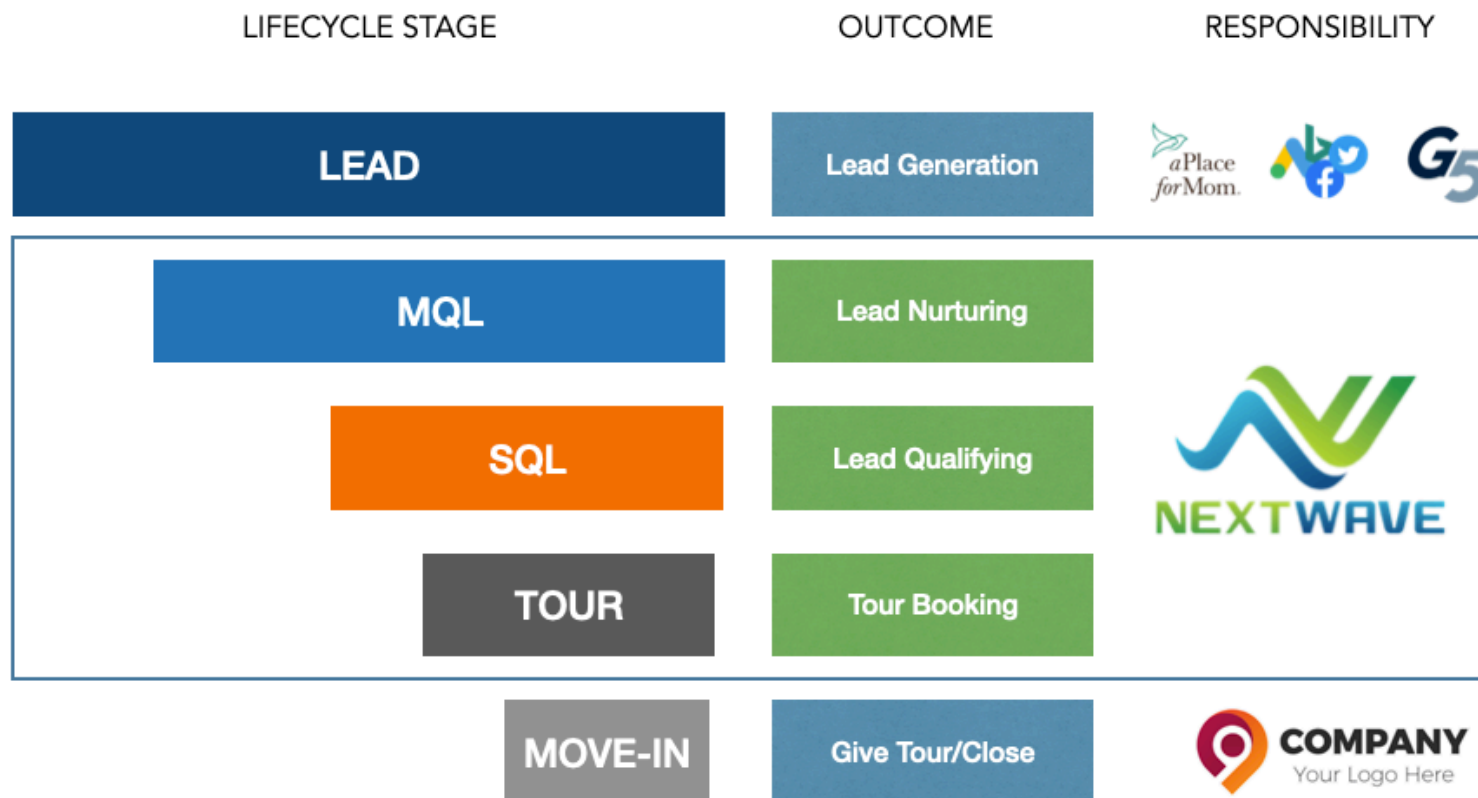


Once you've built your team and gotten them setup with software, a process to follow, and sales/CRM training you may find yourself hit with one of the downsides of performing this task in-house: keeping your talent. It's no secret in the senior living industry that turnover is a major problem. Employees switch companies all the time. Going through the trouble of hiring and training your BDRs only to have them leave 3-6 months later is a major downside to running a contact center in-house. The other obvious potential downside is cost. Consider having to pay 2-4 full time salaries along with benefits and time-off. And typically, unless you pay overtime, this won't include weekend phone coverage.

Although it's a major undertaking to take this role in-house many companies do. As with most specialized services in business you'll have to make the decision using your own process. If you choose the in-house route we plan to offer resources (like this e-book) to make the process as smooth as possible for you.

Outsourcing to a Third-Party Service Provider

The other solution to the problem of lead response is to outsource this responsibility to a third-party company that specialized in it. As with everything there's pros and cons. We feel that the pros of outsourcing greatly outweigh the cons in this case. In fact, when building our business we reviewed each potential solution at length to better understand which would make the most sense for the senior living company. Although we completely understand why companies would want the perceived control and peace of mind of running a contact center in-house, we believe that outsourcing is the obvious choice when looking to solve the lead response problem.



We'll look to cover why by breaking the need down a lead response program into it's 3 most critical components: time, people, and technology.

Time

Time is arguably the most important factor in whether or not you make contact with a prospect. Having people whose primary job it is to contact prospects quickly is critical to the success of a lead response program. Time is one of the reasons why it's not feasible for your current staff to take on the task. In order to respond quickly they'd need to be waiting by the phones. And when comparing to an in-house solution you need to consider how often your new staff would be available. Are they working 9-5? Do they cover evenings? Weekends? An outsourced contact center has people available to respond quickly, even on weekends and on hours when your 9-5 staff would not be available.

People

People are another factor. As we touched on before, this is a very "people-intensive" job. There's no substitute for having warm bodies ready at all times to speak on the phone with prospects. Finding, hiring, training, and retaining these people is a major undertaking. By outsourcing to a company that specializes in senior living BDRs you won't have to worry about any of these. A specialized company will make it their business to have a staff of highly-trained, professional BDRs available throughout the week. And they will have additional staff available should somebody stop working. An outsourced BDR company will have ongoing training as part of their business. At NextWave we have onboarding workshops and senior living sales certifications for each new employee, as well as ongoing training and role playing throughout the year. In addition to sales training we also ensure all our reps have been through Hubspot's software certification program and ongoing training. Which brings us to the last area, technology.

Technology

The last major reason that we believe outsourcing this role to be most effective is the software that's needed to do the job effectively. As we mentioned earlier it's a necessity to have a CRM and a marketing automation

software to run a contact center effectively. And, hopefully, some type of sales enablement software in addition. The cost of such softwares starts to get very expensive, as with most enterprise level sales software. Not only is a big investment financially but it's a big investment to train your in-house BDR team to use it effectively. And then, once fully trained, hope that they don't leave the company. With an outsourced senior living contact center you don't need to worry about this. Not only will they have the best software tools available but their team will already be trained in how to use them. This allows your company to get up and running much faster than if you had to hire and train yourself.

These are just a few of the reasons we believe outsourcing for inbound lead response to be the best course of action. However we encourage you to try it for yourself. There are companies that have the resources and capabilities to run a contact center in-house. And for some companies the best fit may be to do it themselves. But we believe that for the vast majority of companies it will be much more time & cost effective to outsource to a specialized service provider.

If you'd like to set up a BDR team in-house we encourage you to set up a free 30 minute phone consultation with our team. We will provide you with all the information and recommendations to help you get started. If you'd like to take the other route and discuss the process of outsourcing to our team we encourage you to set up a separate call for that. In it we will walk you through the onboarding process, the timeline, and what results you can expect to achieve within weeks of launching the program.



Client Results

- ✓ Made Contact with 96% of their Digital Leads
- ✓ Booked Over 50 On-Site Tours the first 3 months
- ✓ Average a 4-Minute Response Time
- ✓ Contacted Over 50% on the 1st call

[Read Case Study](#)



“

Working with NextWave, we've been able to create a system taking our digital leads and converting them into actual tours of our communities

-Carsten L. (Avista Senior Living)

About NextWave Co.



We specialize in creating digital solutions for the senior living industry via leveraging technology, automation, and machine learning. We're a partner agency of Hubspot and utilize their software solutions to help senior living clients.

- *3 Years in Senior Living Industry*
- *Generated over 15,000 leads*
- *Over 2500 on-site tours*
- *Over 500 move-ins generated*





Schedule a Free Strategy Session Today!

We've worked with numerous senior living companies to improve their response time and their contact rate for digital leads.

Click the button below to schedule a FREE consultation call to review your current process and discuss ways in which you can quickly and easily improve your digital lead response at your organization.

Schedule a Call Today

Footnotes page:

Page 5: Senior living Benchmarks: <https://creatingresults.com/blog/2018/08/28/what-are-good-senior-living-sales-benchmarks/>

Page 8: Follow-Up Statistics: <https://www.invespcro.com/blog/sale-follow-ups/>

Page 10: Graphic: Skaled <https://skaled.com/>

Page 12: Graphic: Skaled <https://skaled.com/>

Page 22: Lead Response Statistics: <https://www.servicebell.com/post/lead-response>

Page 24: Lead Response Statistics: <https://pipeline.zoominfo.com/sales/sales-follow-up-statistics>

Page 26: Sales Call Stats <https://pipeline.zoominfo.com/sales/cold-sales-voicemails>

Page 29: Graphic: Skaled <https://skaled.com/>