



CONVERSION LOGIX®

The Senior Living Director's Guide to Marketing Automation

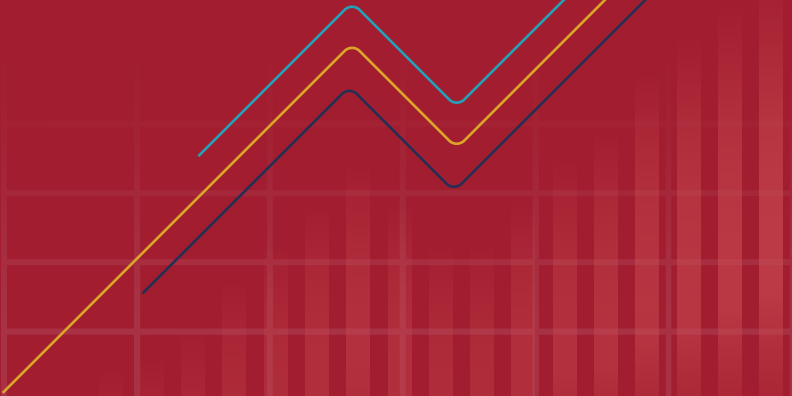
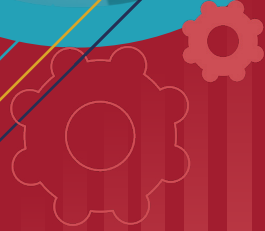
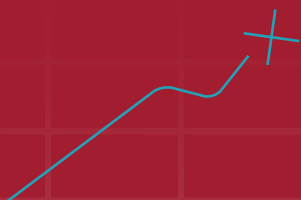




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Why Marketing Automation? Why Now?

As a senior living marketing leader, you face the daunting task of prioritizing projects amidst the constant buzz of modern-day marketing. With an ever-growing list of must-haves and must-dos and not enough time in the day, marketing automation enables you to program repetitive tasks while scaling your reach.

This guide explores marketing automation methods and strategies available in the senior living industry and offers expert advice on how to get more time back in your day and achieve occupancy goals.



State of the Industry

It's a challenging time to be a marketing leader. The pace of technology is moving faster, and it's likely it won't slow down as we gain more exposure and access to AI, automation, and a privacy-centric marketing world.

In addition to the macro forces at play, the industry is experiencing a rise in competition and a labor shortage that has made it challenging to recruit knowledgeable and experienced talent.

Then there are the four constant senior living headwinds:

- **The long sales cycle** makes it challenging to turn around occupancy quickly.
- **Identifying and targeting the right audience** in a market with multiple decision-makers with varying levels of understanding of their care needs.
- **Overcoming negative perceptions** around the industry to establish trust and credibility with reticent buyers.
- **Budget constraints** due to high operational costs limit the resources allocated to marketing and sales.

Navigating all of this are people like you, marketing leaders tasked with developing modern strategies and teams to tackle these challenges. It's going to take superhuman abilities to pull it off, which is why we are so passionate about helping you develop an automation strategy.



The Power of Marketing Automation

Before diving into marketing automation strategies, let's spend some time discussing the benefits of automation.

How Automation Can Help Senior Living:

1. Increase the rate of lead capture.
2. Discern lead quality faster.
3. Nurture leads through a long journey.
4. Personalize prospect communication to increase engagement.
5. Centralize and standardize sources of business intelligence.
6. Implement optimization strategies.

Marketing automation enables marketing leaders to attract and convert higher quality leads and increase the rate of conversions making teams more efficient with limited marketing dollars.

In senior living, occupancy can change on a dime. With marketing automation in place, you keep the pipeline going so those recoveries move faster, positioning you as the hero of the portfolio.



Key Components of an Effective Marketing Automation Strategy

The term marketing automation means many things to many people. At its core, **marketing automation is the process of using technology to manage repetitive tasks or scale tasks that cannot be feasibly done manually.** But what exactly does automation look like in senior living?

After 13 years of experience in the senior living industry, we've found these are the three most important automation use cases for senior living marketing:

1. Lead Generation

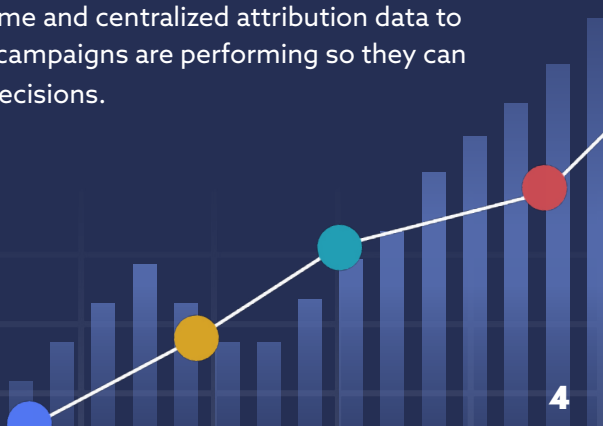
Not every prospect starting their senior living journey is ready to pick up a phone for a call, but when they do want to contact a community, they want answers immediately. This is where website tools like automated tour scheduling, live chat, and gated content can create a better strategy for converting prospects and growing your pipeline.

2. Lead Nurturing

Once a lead is in your system, you want them to remember your community and have the information they need to make a buying decision. Email and text campaigns launched at designated intervals are a powerful way to move prospects through a long sales cycle.

3. Reporting and Analytics

As marketing becomes more complex, fully understanding its effectiveness becomes more challenging and time-consuming. Today's directors need real-time and centralized attribution data to quickly determine how their campaigns are performing so they can make informed investment decisions.



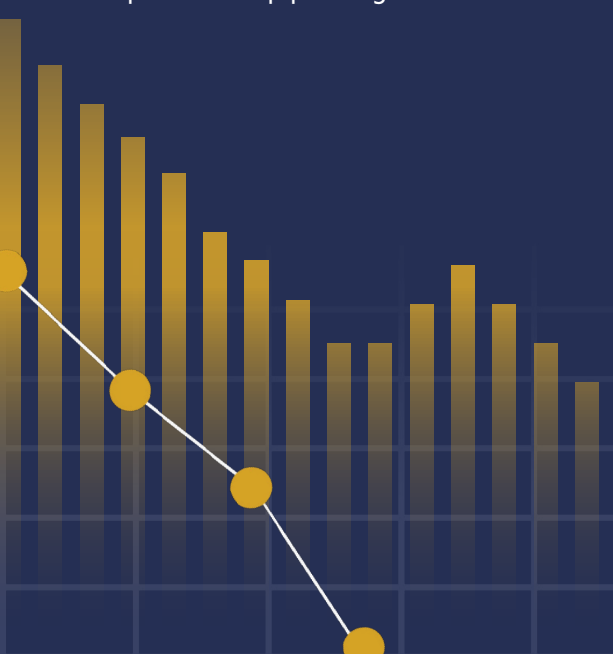
Lead Generation

Turn anonymous website traffic into qualified leads.

Lead capture opportunities on your website are critical for turning anonymous website traffic into qualified leads. Often senior living websites lack these applications missing their chance to connect with interested prospects.

With so much of the customer journey happening online, providing a seamless experience for website visitors to give their contact information at different stages of interest will build your sales pipeline.

Let's explore how marketers can use automation technology to scale and improve their pipeline growth.



1. Optimizing for Lead Generation



Finding the right senior living community is a process that requires education and guidance to help prospects make informed decisions. Each information exchange creates an opportunity to expand your pipeline and track engagement. As a lead generation technology provider, we've seen firsthand the significant impact lead capture applications have on boosting website lead conversion rates. Here are several calls to action we've seen clients use on their sites to increase engagement.

- **RSVP for an event.** This prompts an email confirmation with the event details, and the contact is sent to the onsite team immediately via an email notification or to their CRM.
- **Schedule a tour.** This prompts a calendar with real-time availability at the community level.
- **Do you qualify?** Prospects are asked a series of questions to determine their ability to qualify for the service financially.
- **Download an e-brochure.** A PDF with information about care levels and other details is available automatically in exchange for their lead information.
- **Chat now.** A prompt is activated to speak with a live chat representative.
- **Claim this offer.** A promotion is available to claim by giving the community your information.
- **Watch a virtual tour.** A video is automatically delivered after we gather the prospects' contact information.

2. Maximizing First-Party Data Collection

We often hear senior living marketing and sales teams concerned that online leads aren't as qualified. Many have had negative experiences with internet listing sites, thus deprioritizing these leads.

You can automate the lead qualification process by adding qualifying questions when prospects schedule a tour, claim an offer, or register for an event to gauge their needs and interests.

Here are some examples:

"How ready is the family for a move into senior living?"

"What is your monthly budget?"

"What concerns you about a decision to move to senior living?"

"How are you currently managing day-to-day activities?"

"Would you like to schedule a call or tour at this time?"

3. Integrating Your CRM

By automating the delivery of leads to your CRM, you can centralize lead information, making it easier for your team to communicate, follow up, and track your marketing strategies. This increases the likelihood of your team responding to leads in a timely manner while reducing the burden of manually updating your CRM as new contacts come in through your website.

Lead Nurturing

Leverage automation to maximize lead follow-up.

We understand the senior living buyers' journey can often be long and unpredictable. Manually tracking leads over an extended amount of time isn't scalable and will most likely result in leads falling through the cracks. To stay top-of-mind, as your competitors will, it's imperative to implement a well-planned automated lead nurturing strategy. Here are a few ways to nurture leads:

- Activate automated sequenced email campaigns once a lead converts on your website.
- Send automated SMS sequenced messages after a lead opts in.
- Launch retargeting ads that prompt website visitors to take action, e.g., schedule a tour, attend an event, or claim an offer.



Tips for Designing Personalized and Engaging Email Sequences

Of the strategies listed above, email nurturing offers the most customization and the highest conversion rates. Our digital marketing experts have detailed some tips and strategies to level up your email marketing game.

Include Dynamic Email Content

Scaling personalization is one of the many benefits of automation. To achieve this, we recommend adding dynamic content in your email campaigns. Dynamic content identifies specific fields in your email list or database and replaces them with personalized information for each recipient. It's a powerful tool for scaling personalization effectively.

Try it out by including the first names of your prospects in the subject line of your next email campaign. Over the years, we've seen this tactic produce the most significant impact on open rates.



Segment Leads Based on Preferences and Behaviors

Designing multiple sequences for different buyers and different buying scenarios will result in higher engagement. The more your content is customized, the more of an increase you will see in your open and click rates.

Here are several segmentation strategies to try for your next lead nurturing campaign:

- The care level they are interested in.
- Their decision timeline.
- Whether the senior has sold their home or whether they still need to take this step.
- Location (local vs. out of state).
- The initial action they took on your site (schedule a tour, claim an offer, inquire about pricing).
- How engaged they have been with your previous marketing.

Use AI to Speed Up Copywriting

By now, you've probably heard of the new open-source AI platform taking the tech world by storm, Chat GPT. It's a free tool you can use to generate ideas when creating email copy for your lead nurturing sequences. We asked the AI to give us three prompts it recommends you use when asking for email copywriting help. Here's what it had to say:

"Can you create copy for a compelling email that highlights the benefits of our senior living community's amenities and services?"

"I need engaging email copy to promote our upcoming virtual event for seniors. Can you capture their interest and encourage them to register?"

"We want to nurture our leads who have shown interest in memory care services. Can you create empathetic email copy that addresses their concerns and highlights the compassionate care we provide?"

In order for the AI to help you write email copy that is specific to your community, add this to your prompt:

- Say who the target audience is.
- Mention the lead will receive this email right after signing up for a tour (or whichever action you are using as a trigger).
- Then list your community's name, location, unique value proposition, amenities, and services.

Word of Caution:

This AI isn't perfect and requires oversight and editing for the best results. Use it as a source of ideas, a draft, or an editor to help you achieve a specific tone, but make sure to proofread the copy.

Reporting and Analytics

Harness insights to make data-driven decisions.

Busy marketing leaders don't have time to compile ad hoc reports that take into account all the active channels in a comprehensive campaign. Automating your reporting can be a huge time saver. Here are three features your analytics platform should include:

1. A centralized dashboard.

Use reporting platforms that gather data from various sources, such as ad performance, lead generation, and prospect communication.

2. Multi-touch attribution tracking.

This reporting gives weight to the first and last marketing source that generated a lead, as well as the intermediary ads that were engaged with along the way. It provides a more accurate understanding of how specific ads contribute to lead generation.

3. Content engagement tracking.

Tracking the content a lead sees when scheduling a tour, engaging in live chat conversations, or utilizing click-to-call tracking for phone calls offers valuable insights for identifying key actions that shape your typical prospect journey.



Putting All the Strategies Together

Let's walk through a real-world example of a senior living client Conversion Logix® provides advertising, lead generation, and analytics. This example illustrates how you can build a cohesive and efficient marketing campaign with automation.

Scenario:

A portfolio of communities located in California offers Independent, Assisted, and Memory care services. Their unique value proposition is their holistic wellness care focusing on physical, mental, and spiritual health. Their portfolio was experiencing resident turnover in memory care more than other care levels, and they were tight on staff.

Automation-Backed Marketing Strategy:

1. Website Designed for Conversions



Each community site has a set of calls to action within a lead generation application that enables the onsite team or marketing director to promote events easily, create offers, gate content, and highlight tours.



2. Sophisticated Lead Tracking

Marketers or sales staff can log in to their lead platform anytime and see the number of engagements each lead has taken, emails they received, when they converted, and which ads they clicked on.



3. Email Nurturing

Lead nurturing sequences were designed to automatically send a series of emails to new leads who claimed offers, attended events, or scheduled tours.



4. Attribution Reporting

Multi-touch attribution was analyzed to learn how their campaigns worked together to build awareness, trust, and action.

Best Practices for Implementing Marketing Automation

Marketing automation offers powerful capabilities that create much-needed efficiencies, but like any new tool, it isn't a replacement for strategy and requires sharpening to be effective.

Our digital marketing experts have sage advice to maximize your marketing automation strategy and implementation.

1. Identify and understand your target audience.

One of the biggest opportunities marketing automation provides is the ability to reach a targeted audience and deliver personalization at scale. But it can only be as effective as your targeting strategy. The more precise you are on the buyers you want to reach, and the more intentional you are about how you record information, the more effective your marketing efforts with automation will be.

2. Craft compelling and personalized messaging.

Speed isn't a substitute for quality when it comes to delivering your message. Take the time to develop compelling copy and utilize dynamic content tags to change your message to match each prospect. Start with first-name personalization in emails and work your way up to custom campaigns for each buyer's interests and stage in the journey.

3. Set up automation workflows and then test them for efficiency.

Map out how you think the customer journey goes for each service you offer, and then audit your current marketing to see if you are meeting a prospect at each stage of this journey. Align automation to help ensure your messages are timed and primed to move prospects to the next action. Then see which parts of the funnel your team isn't able to keep up with, where you may be dropping the ball, and double down on closing those gaps to ensure the entire funnel isn't affected by one missed step in the process.

4. Continuously optimize and iterate based on performance data.

One of the most underrated aspects of building automated marketing campaigns is the ability to record and analyze your campaigns faster and more efficiently. Set up dashboards and integrate your systems so you can see KPIs at a glance in real time and pinpoint the reasons when KPIs change. Ask yourself what you can do to increase the rate of conversions rather than the volume, so you can build systems that can do more with less and adapt as budgets fluctuate.



About Conversion Logix

Conversion Logix® is a senior living and multifamily marketing agency that helps management companies attract and convert move-in-ready residents with targeted solutions. By using digital marketing automation software, and cutting-edge advertising technology, our team of experts works with marketing and sales leaders to create a strong online presence that positions your community for digital success in an increasingly competitive market.

Our Approach To Senior Living Marketing

At Conversion Logix®, we understand the unique requirements of the senior living business and are equipped to implement proven marketing solutions with speed and agility to prevent occupancy rates from affecting profits. **We've worked with thousands of senior living communities and management companies to deliver qualified leads at scale when they need it most.** We're a unique senior living marketing agency, and we like it that way. Here's why:



Strategic Account Management

We're more than your agency. We're an extension of your senior living marketing team. Our consultative and collaborative approach enables you to reach peak occupancy.



Unparalleled Speed And Responsiveness

Senior living communities are dynamic. You need a flexible marketing agency partner who can quickly turn around marketing campaigns with speed and precision.



Proven Results Again And Again

For 13 years, our senior living digital marketing solutions have exceeded client occupancy goals by delivering qualified leads and insights that optimize ROI.

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