

WELCOME TO

# MASTERING THE JOURNEY: FROM LEAD TO LOYALTY

## Key Takeaways:

1. Human-First Philosophy in Strategic Planning
2. The Value of Mapping the Prospect Journey
3. Sales Enablement and CRM Utilization
4. Addressing the Strategic Gap in the Post-Purchase Experience
5. Developing Residents as a Referral Source Engine
6. Planning for Attrition and Closing the Operational



## **Embracing a Human-First Philosophy**

**“At the heart of strategic planning is an unwavering commitment to the human experience.”**

**Empathetic strategies can lead to a 35%  
higher resident satisfaction rate.**

**Ready to Creating an Empathetic Experience?**

**Implement empathy training workshops to cultivate a culture of care and understanding.**

## Visualizing Success: The Prospect Journey Map

“Mapping each step from initial contact to move-in provides invaluable strategic insights.”



**Communities with journey mapping typically see a 20% improvement in lead conversion rates.**

**The Power of Personalizing the Prospect Experience**  
Create detailed journey maps to enhance personalization at every touchpoint.



## INITIAL CONTACT & AWARENESS

Begins search for senior living options, mainly online, including viewing websites, reading testimonials, and engaging with social media.

1

## INFORMATION GATHERING & SHARING

Seeks detailed information about living options, amenities, and services through brochures, emails, and engaging content.

2

## COMMUNITY TOUR

Visits communities virtually or in person to envision the senior's potential life there, assessing environment and compatibility.

3

## ASSESSMENT & DISCUSSION

Evaluates if the community meets their needs and preferences, engaging in discussions about care options, lifestyle, and finances.

4

## DECISION MAKING

Deliberates on the best choice based on the clarity and consistency of information received across all touchpoints.

5

## FINANCIAL PLANNING & PREPARATION

Explores costs, funding options and long-term financial sustainability with the community's financial advisors.

6

## FINALIZING THE MOVE

Focuses on the logistics of moving, including downsizing and planning the transition, seeking emotional support from the community.

7

## SETTLING IN & ONGOING RELATIONSHIP

Focuses on the senior's integration into the community through activities, forming new relationships, and adjusting to the new environment.

8

# SAMPLE FAMILY JOURNEY MAP



## **CRM: The Catalyst for Sales Enablement**

**“Effective CRM utilization transforms lead management into relationship nurturing.”**



**Full adoption of CRM software leads to a 25% increase in lead-to-resident conversion.**

**Streamline the Sales Experience**

**Utilize CRM insights for targeted communication and streamline the sales process.**

# SALES PROCESS

## 1 INITIAL CONTACT & AWARENESS

Captures attention through digital advertising, social media, and referrals. Responds promptly and personally to inquiries.

1

2

## 2 INFORMATION GATHERING & SHARING

Provides informative websites and downloadable resources. Uses email marketing for tailored information based on initial inquiries.

3

4

## 3 COMMUNITY TOUR

Offers personalized physical and virtual tours. Follows up post-tour to address questions and reinforce community value.

## 4 ASSESSMENT & DISCUSSION

Conducts assessments and detailed discussions, providing transparent information about care options and costs.

5

6

## 5 DECISION MAKING

Facilitates follow-up consultations, provides comparisons of living options, and may offer meetings with current resident or trial stays.

## 6 FINANCIAL PLANNING & PREPARATION

Offers clear cost breakdowns and financial planning guidance. Discusses long-term financial sustainability with families.

7

8

## 7 FINALIZING THE MOVE

Assists with moving logistics and offers resources for downsizing and emotional support. Prepares a welcoming and orientation program.

## 8 SETTLING IN & ONGOING RELATIONSHIP

Engages new residents through regular check-ins, solicits feedback, and maintains continuous communication with family members.



## **Beyond the Sale: Fostering Lasting Engagement**

**“Addressing the strategic gap to ensure satisfaction transitions into loyalty post-purchase.”**



**WELCOME**

**60% of residents feel more engaged with a personalized onboarding experience.**

**Enriching the Onboarding Experience**

**Develop an onboarding program that honors the resident's life story.**





# USING THE LIFE STORY FOR REAL LIFE

A strategy that employs personal history to customize the onboarding experience, boosting the sense of belonging and connection.

## TESTIMONIALS OR IT DIDN'T HAPPEN

Highlights the power of sharing real stories and testimonials in turning satisfaction into advocacy.



## Activating Your Referral Powerhouse

**“Empowered residents become your most persuasive advocates.”**



**Resident-referred leads have a  
30% higher rate of conversion  
than other sources.**

**Leveraging the Resident Experience for Referrals  
Implement a referral reward program to turn satisfaction into advocacy.**

## Closing the Back Door: Strategic Attrition Management

“Anticipating and addressing the reasons behind resident departures.”

**Communities that plan for  
attrition could see a  
15% decrease in annual turnover.**



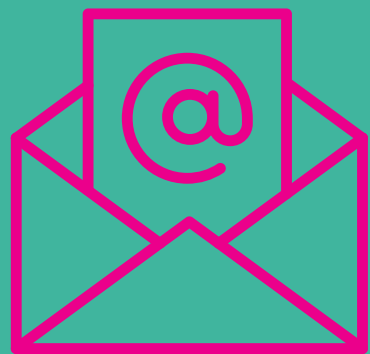
**Maintain Long-Term Satisfaction with Effective Feedback Loops**

**Regular satisfaction surveys and community forums can identify and mitigate potential issues early on.**



# Mastering the Journey Together

Thank you for joining us in redefining the path from lead to lasting loyalty!  
Become part of our community of innovators, dedicated to enhancing the senior living experience.



## Access The Resource

Watch your inbox for a compressive guide as a thank you for attending!

Pick your coffee 

