CASE STUDY
Continuing Care Retirement Community
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Client Benefits
The key benefits for the case were:

- Occupancy increased 3% for independent living and 2.2% for the portfolio
- Entrance fees finished an average of 46% over goal each year ($7.8 million surplus annually)
- Phone conversion rates from inquiry to tour increased to above 59%
- Scheduled tours increased by 20% year-over-year
- Average days from inquiry to tour decreased from 35 days to 12 days
- Internet conversion increased to over 30%

ORGANIZATION
Customer: Not-for-profit owner/operator
Property Type: Continuing Care Retirement Communities (CCRC)
Site Demographics: Seven communities, 1,300+ beds
Sales Staff: Two to three sales employees per community

Service
Enquire Solutions implemented a dedicated remote sales team seven days a week, as well as EnquireLEADS® CRM, website and referral (online directory) integration, marketing automation and online chat.

Challenge
Senior management identified that in many cases, prospect information was not being captured or documented and a follow-up step was not being completed. In addition, prospective residents were receiving less than desired customer service, primarily because sales staff were often away from their desks when sales calls were transferred to them. Furthermore, when the communities experienced employee turnover, hundreds of leads were left stagnant with no next steps and documentation regarding where they were in the sales process. In a year-over-year comparison, there were over 1,300 leads a year identified that were not documented.

The company’s legacy CRM was not ideal for nurturing leads. There were 2,593 active leads in their system that did not have any follow-up scheduled. Additionally, data was isolated by community and information was not shared. Most of the communities were located in close proximity to each other, so many times, a lead was duplicated throughout many of their databases.

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Return on Investment
The company recognized a 307% Return on Investment (ROI) when comparing gross revenue gain versus the cost of Enquire Solutions’ services.

Solution
Enquire Solutions implemented a solution that provided a centralized sales call center to ensure all inbound calls, internet leads and referrals are answered immediately, documented and scheduled for follow-up. While alternative options were considered (such as extended hours for staff and hiring additional personnel), the affordability of a dedicated team guided the company to outsource these functions. The EnquireLEADS® CRM was also implemented at all of the communities and integrated with a marketing automation system, each community’s website and online referral directories for consistent tracking of leads.

Benefit
By engaging Enquire Solutions, the company was able to achieve their objective of centralizing all sales and marketing efforts. Their dedicated call center sales team was able to increase the total amount of scheduled visits by 20% due to high conversion upon first contact and ongoing follow-up. Additionally, the length of the sales cycle was cut in half, which increased the speed in which prospective residents moved in. The team also ensured that all prospects in the sales pipeline had a scheduled follow-up activity to keep the pipeline full.

Under the new process, inbound calls are answered promptly and sales calls are not transferred to voicemail. As a result, call-in conversion ratios for independent living, assisted living and memory care reached approximately 59% and occupancy increased 2% for the portfolio. Entrance fees finished an average of 46% over the annual goal, accounting for $7.8 million surplus annually.