

# Top 5 D.I.Y. Marketing Tips for 2019

**Build Goals** | **Plan** | **Promotions** | **Execute** | **Measure**



# Your Hosts



## **Jamison Gosselin**

Principal and Executive Consultant

Jamison Marketing & Communications LLC

15+ years leading marketing, communications, sales and resident programs at aging services organizations.



## **Deborah Howard**

Founder

Senior Living SMART

Career long commitment to advancing sales and marketing best practices in senior living operations.



# Overview



# Tip #1: Assess Your Situation

## Strengths

- Great sales execution (high conversion rate)
- Product is safe, clean, friendly and fun
- Well known, good reputation

## Weaknesses

- Professional referral leads
- Resident referral leads
- No one-bedroom availability (at this time)

## Opportunities

- New CVS opening five blocks away.
- Home values have grown 10% YOY.
- City is cutting budget at local senior center

## Threats

- Flu season
- New community opening 1 mi away
- Overwhelmed by lead inquiries/time.



# Tip #2: Start with Numbers

Budgeted MIs = Lead Volume (Y) / Conversion Rate

4 Move ins =  $Y \times 12\%$  or  $4 / 12\% = Y$  | So,  $Y = 33$  leads

	January	February	March
Budgeted MIs	4	5	4
Conversion Rate	12%	12%	12%
Leads	33+	42+	33+
Cost Per Lead	\$200	\$200	\$200
Promo Budget	\$6,600	\$6,600	\$6,600

Like your budgeted Move-ins, these are all starting points to help you plan. Ideally, you'll produce more leads, have a higher conversion rate and produce more move-ins with less money? How?

# Tip #3: Select Your Lanes & Targets

## Lead Generation

Demographics  
Socio-economic  
Psychographic

Senior  
Adult Children

## Lead Nurture

Psychographic  
Timeframe  
Need

## Professional Referral Sources

Medical  
Religious  
Financial  
Government  
Social

## Personal Referral Sources

Residents  
Resident's Families  
Employees  
Neighbors  
Volunteers

**Buyer Journey**

# Tip #4: Select & Customize Promotions

## Product/Brand

- Lifestyle
- Product/Services
- Differentiators
- Drive awareness
- Drive leads

## Event

- Lifestyle
- Experiential
- Drive leads
- Drive conversion

## Price

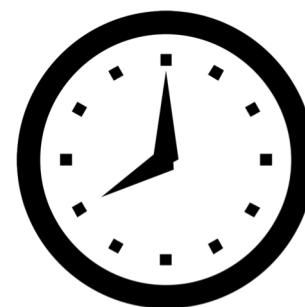
- Discounts
- Savings
- Drive sales
- Personalization



Whole home approach.

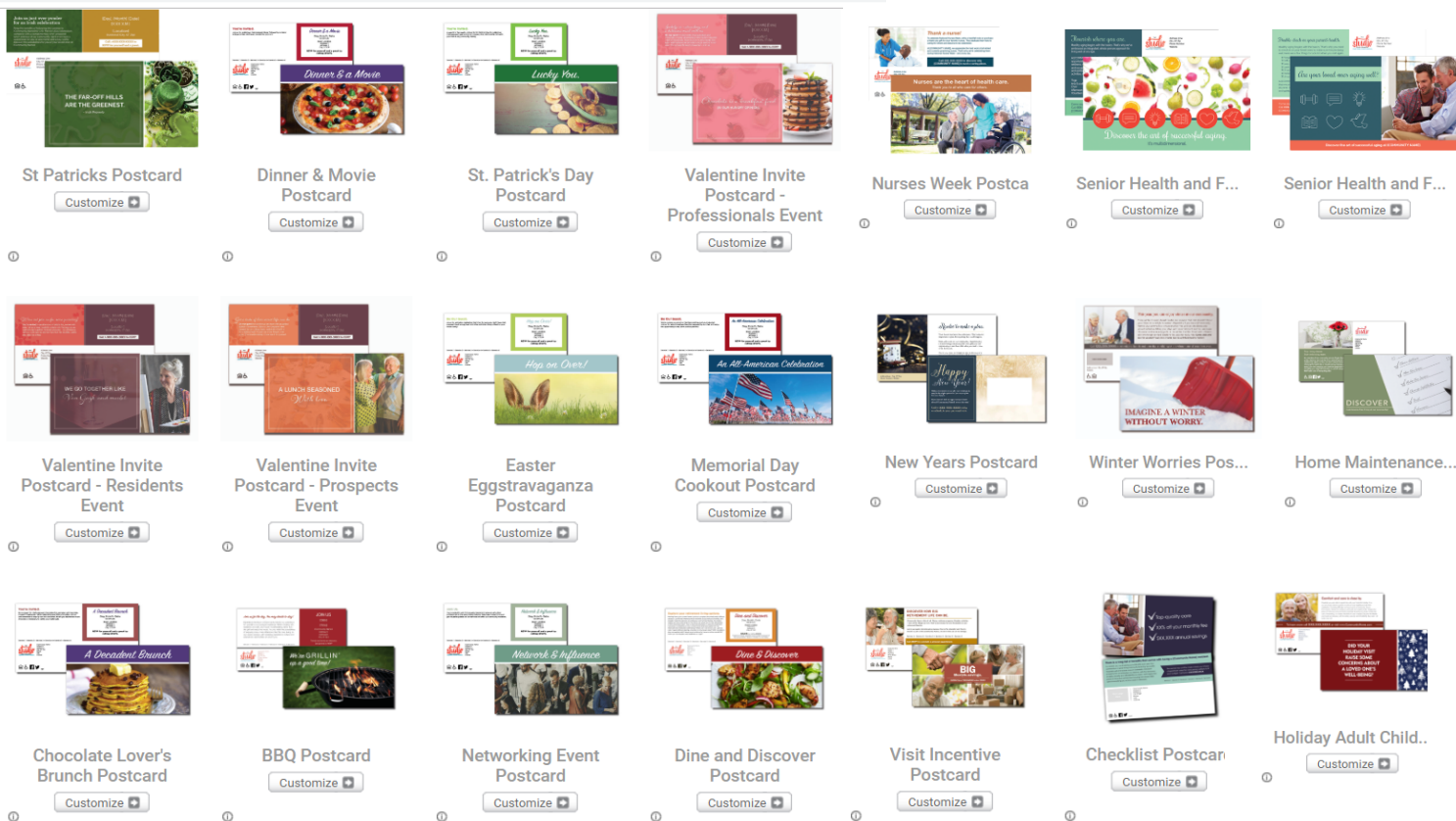
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1. 10:00 AM - 11:00 AM: Morning Meeting 2. 11:00 AM - 12:00 PM: Client Meeting 3. 12:00 PM - 1:00 PM: Lunch 4. 1:00 PM - 2:00 PM: Client Meeting 5. 2:00 PM - 3:00 PM: Client Meeting 6. 3:00 PM - 4:00 PM: Client Meeting 7. 4:00 PM - 5:00 PM: Client Meeting	1. 10:00 AM - 11:00 AM: Morning Meeting 2. 11:00 AM - 12:00 PM: Client Meeting 3. 12:00 PM - 1:00 PM: Lunch 4. 1:00 PM - 2:00 PM: Client Meeting 5. 2:00 PM - 3:00 PM: Client Meeting 6. 3:00 PM - 4:00 PM: Client Meeting 7. 4:00 PM - 5:00 PM: Client Meeting	1. 10:00 AM - 11:00 AM: Morning Meeting 2. 11:00 AM - 12:00 PM: Client Meeting 3. 12:00 PM - 1:00 PM: Lunch 4. 1:00 PM - 2:00 PM: Client Meeting 5. 2:00 PM - 3:00 PM: Client Meeting 6. 3:00 PM - 4:00 PM: Client Meeting 7. 4:00 PM - 5:00 PM: Client Meeting	1. 10:00 AM - 11:00 AM: Morning Meeting 2. 11:00 AM - 12:00 PM: Client Meeting 3. 12:00 PM - 1:00 PM: Lunch 4. 1:00 PM - 2:00 PM: Client Meeting 5. 2:00 PM - 3:00 PM: Client Meeting 6. 3:00 PM - 4:00 PM: Client Meeting 7. 4:00 PM - 5:00 PM: Client Meeting	1. 10:00 AM - 11:00 AM: Morning Meeting 2. 11:00 AM - 12:00 PM: Client Meeting 3. 12:00 PM - 1:00 PM: Lunch 4. 1:00 PM - 2:00 PM: Client Meeting 5. 2:00 PM - 3:00 PM: Client Meeting 6. 3:00 PM - 4:00 PM: Client Meeting 7. 4:00 PM - 5:00 PM: Client Meeting	1. 10:00 AM - 11:00 AM: Morning Meeting 2. 11:00 AM - 12:00 PM: Client Meeting 3. 12:00 PM - 1:00 PM: Lunch 4. 1:00 PM - 2:00 PM: Client Meeting 5. 2:00 PM - 3:00 PM: Client Meeting 6. 3:00 PM - 4:00 PM: Client Meeting 7. 4:00 PM - 5:00 PM: Client Meeting

Personalized lead nurturing.



Manage time wisely.

# Tip #4: Select & Customize Promotions



Brand on demand systems like The Studio offer dozens of templates from where you can customize copy, colors, calls to actions, photos and community information.

# Tip #5: Distribute Effectively



Brand on demand systems like The Studio make a variety of pre-designed media available with 100+ themes available to customize and promote your brand and events.

# Tip #6: Measure Your Success



- # Post Cards Mailed
- # Inquiries (Phone/Web)
- # Leads
- # Tours
- # Move-ins

Call tracking for direct mail or each promotion.

Dedicated URLs and/or web landing pages for direct mail and/or this post card. Monitor in Google Analytics. Feed your CRM correct sourcing data for leads.

# Putting it all together.

Lead Generation	January   4 MI   33 Leads @ 12%	Projected Leads	Actual Leads
Advertising	Direct mail drop Jan 2. Newspaper ads Jan 4, 10. Promo: Event – Jan 16: Supper Club. (New Leads, Existing Newspaper ads Jan 16,24 Promo: Product – Ease Winter Weather Burdens Leads, Current Residents); Budget: \$5450	8	
Online	Ongoing paid search campaign by corporate. Budget: \$500	11	
Paid Referral Services	Invitation and phone follow-up: Drop Jan 4 Promo: Event - Chef Display Lunch. (Local referral service contacts); Budget: \$250.	8	
Professional Referral Sources	Direct mail drop Jan 8. Promo: Event – Jan 21: Realtors Wine Tasting w/Tinto Wines Budget: \$550. Invite CVS GM/Pharmacists.	5	
Personal Referral Sources	Flyer drop and mailer to residents/families. Promo: Q1 Referral Bonus \$1000 off rent.	5	
Other		2	



# Resources



[www.seniorlivingsmart.com](http://www.seniorlivingsmart.com) (click SMART HQ Resources)

Marketing Budget Spreadsheet Bundle



Quarterly Marketing Plan Template

Quarter/Year: _____ Budget \$: _____		
EVENTS (Prospects, Professionals or Networking)		
Event Name	Date/Time	Target Audience
Purpose		Estimated Cost
NOTES:		
Event Name	Date/Time	Target Audience
Purpose		Estimated Cost
NOTES:		
Event Name	Date/Time	Target Audience
Purpose		Estimated Cost
NOTES:		
Event Name	Date/Time	Target Audience
Purpose		Estimated Cost
NOTES:		

Competitive Analysis Form

COMPETITIVE ANALYSIS					
DATE COMPLETED	YOUR COMPANY	COMPETITOR 1	COMPETITOR 2	COMPETITOR 3	COMPETITOR 4
General Info					
Opening Date					
Unit Mix					
Total # of Units					
Occupancy					
Total Units Occupied					
Occupancy % - Total					
Rates					
Community Fee					
Monthly Rates - Independent Living					
Studio					
One Bedroom					
Two Bedroom					
Monthly Rates - Assisted Living					
Companion					
Studio					
One Bedroom					
Two Bedroom					
Additional Levels of Personal Care - Assisted Living					
Level 1					
Level 2					

Event Planning Template



THE  
**studio**  
powered by GLYNNDIVINS  
Click - Customize - Print

The Studio is an online brand on demand technology where users click, customize and print a wide variety of pre-designed marketing materials featuring a large selection of event, product and price promotions.

[www.seniorlivingsmart.com/thestudio](http://www.seniorlivingsmart.com/thestudio)





# About The Studio

The Studio	SMARHub	SMART Store	Digital Marketing Solutions
Low cost, entry level brand on demand solution to customize and print a variety of media and marketing collateral.	Entry level brand communications and document management system. Perfect for when you already have a brand communications portfolio.	Premium brand communications and document management system customized to your branding and needs.	Strategy, development, execution and management of web sites, search engine marketing, marketing automation and web analytics.
Shared customization platform	Shared platform with secure brand partitions.	Dedicated platform.	Dedicated platforms using popular MarTech options.
No Cost Basic Access; \$100/mo/community Pro Access.	Fees?	Fees?	Fees based on contract.

# Questions



Deborah Howard, Founder

Andrea Catizone, Founder

Paul Trusik, Director of Digital & Inbound  
Marketing

1-888-620-9832

[info@seniorlivingsmart.com](mailto:info@seniorlivingsmart.com)

[www.seniorlivingsmart.com](http://www.seniorlivingsmart.com)