



CONTINUUM CRM™

CRM User Adoption

Why is it Important

How to get it

Management's Role

Training

User Experience



Poll Question 1

What is your current CRM status?

A: Not looking

B: Searching Immediately

C: Planning for next year

D: Purchased a new CRM and getting ready to implement now

User Adoption – Why is it Important



Data Collection

Strategy

Employee Motivation

Investment

User Adoption – How to Get it



**TOP DOWN
SUPPORT**



**USER FRIENDLY
CONFIGURATION**



TRAINING



**LEVERAGE
THE
TECHNOLO
GY**

Top Down Support – Management's Role

- **Drive Project**
 - Selection
 - KPI's
 - Design
 - Implementation
 - Training
- **Use The CRM**
 - Sales coaching
 - Marketing strategy
 - Executive reporting
- **Reinforcement**
 - Regular training
 - Continuous improvement



Team Involvement

Discuss Current Usage

Give Tools to Increase Effectiveness

Streamline Processes

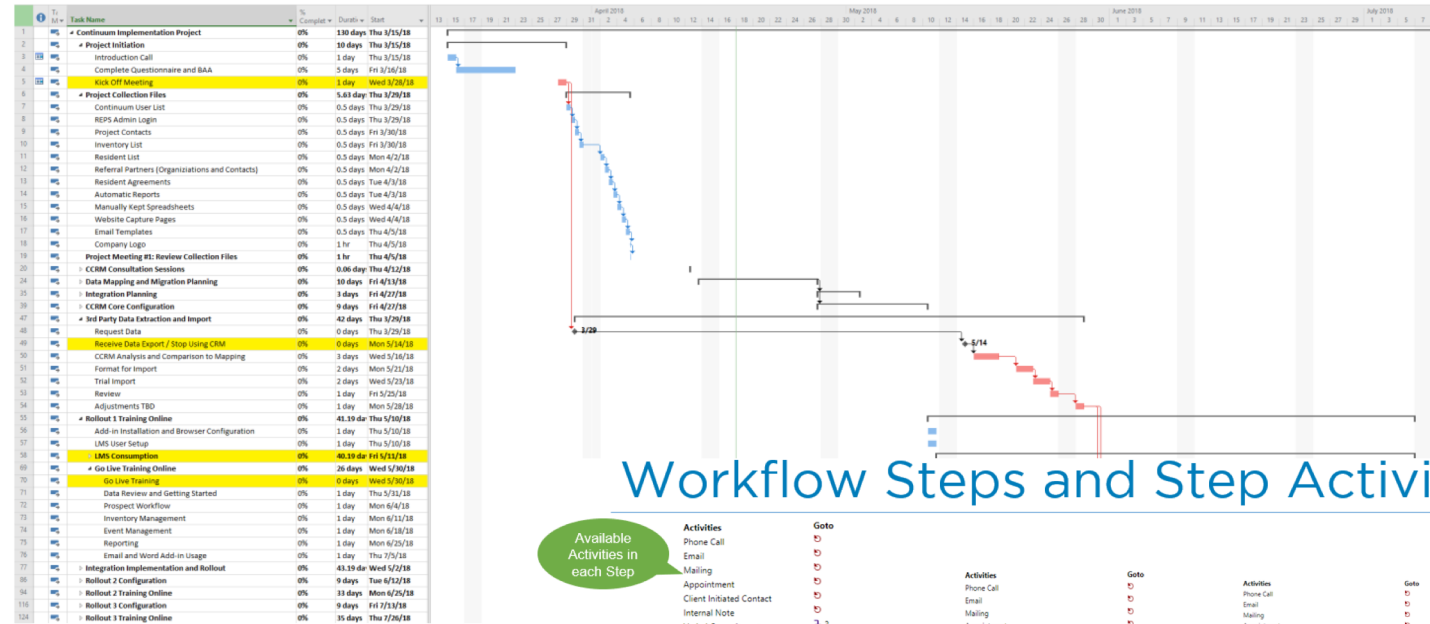


Project Implementation & Data Migration

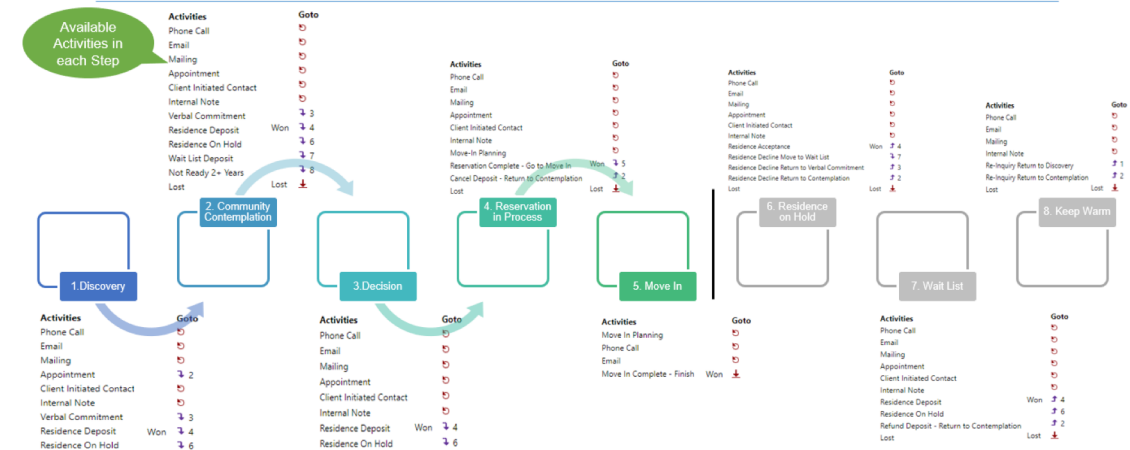
Methodical and
Structured
Project Plan

Coordination
and Project
Management

Workflow
Consultation
Data Migration



Workflow Steps and Step Activities



User Friendly Configuration

Ease of use

Tailor to User/Role/Community

Incorporate your culture

USER
EXPERIENCE

Training

**Appeal to all
learning styles**

**Role based
training**

**Training sales
process**

**Support after the
project**



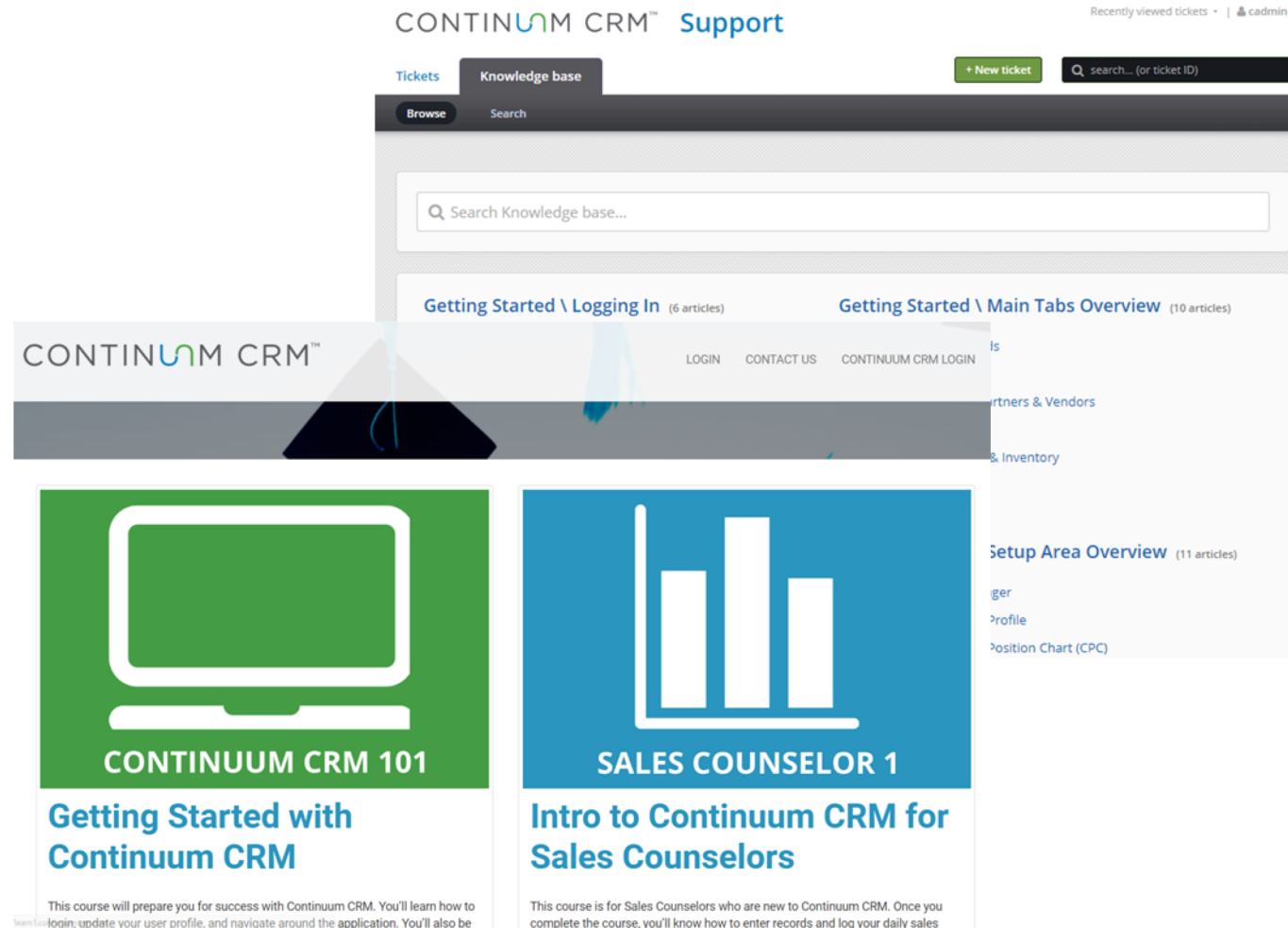
Appeal to all learning styles

Visual

Audible

Verbal

Kinesthetic



Role Based Training

Sales Counselor

Sales Support

Marketing

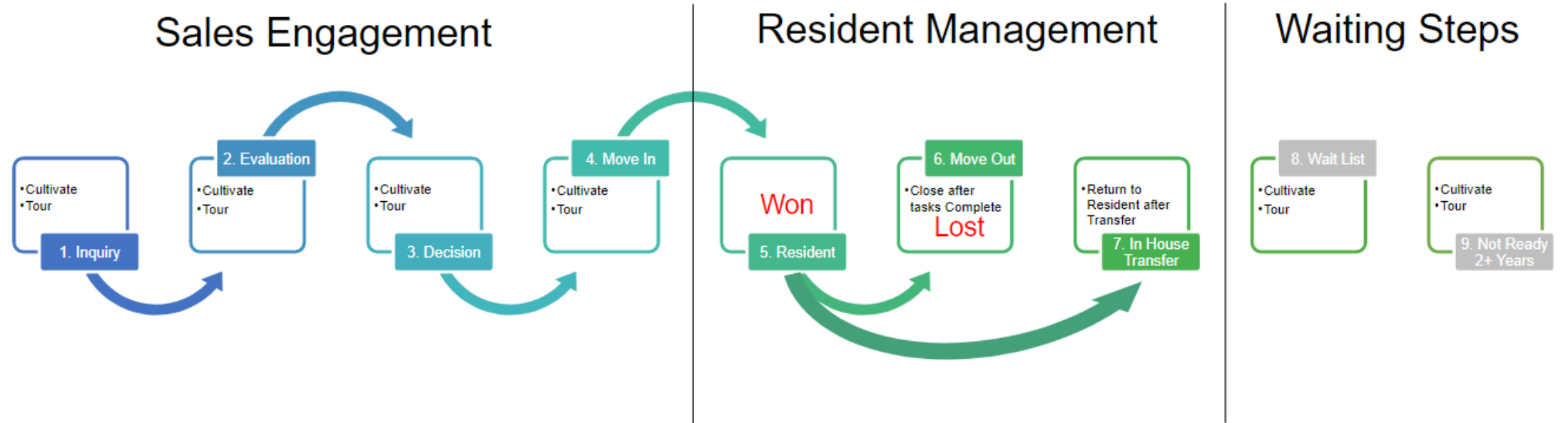
**CRM
Administrator**



Poll Question 2

Does your organization currently follow a defined sales process?

Sales Process: Why does it Matter



Purposeful Engagement

Forward thinking

**Reinforces
consultative
selling**

**Incorporates
your process and
language**

The screenshot shows the 'Record Activity' form in Continuum CRM. The form is titled 'Record Activity' in a blue header. Below the header, the following information is displayed:

- Sales Workflow: **Connie Estrada** (This Sales Workflow is currently Open)
- Contact: **Estrada, Rosemary** | re100@cvip.net | (559) 447-1273
- Current Step: **Nurturing Relationship** [Show the Workflow](#)
- Current Step Owner: **Lara, Lanette**
- * Completed Date:
- * Activity: **Planned**
 - ☒ Follow up call (Task: 9/11/2017)
 - * Result:

Cancelled

Completed

No Status

Removed
 - * Duration: Minutes
- Unplanned: ☐
- Notes:

At the bottom right of the form, there are two buttons: 'Cancel' and 'Plan Next Activity'.

Two green callout boxes provide additional context:

- A callout pointing to the 'Result' dropdown menu contains the text: 'Activity Results Show status of previously planned interactions'.
- A callout pointing to the 'Plan Next Activity' button contains the text: 'Plan your next engagement'.

Ongoing Support



**KNOWLEDGE
BASE
AND FAQs**



**ONLINE
SUPPORT
DESK**



**PHONE
SUPPORT**



**REMOTE SESSION
TECHNICAL AND
CONFIGURATION
SUPPORT**

Poll Question 3

Do you feel like your team leverages all the functionality of your current CRM?

Prospect readiness scoring



Workflow

1. Discovery & Qualification

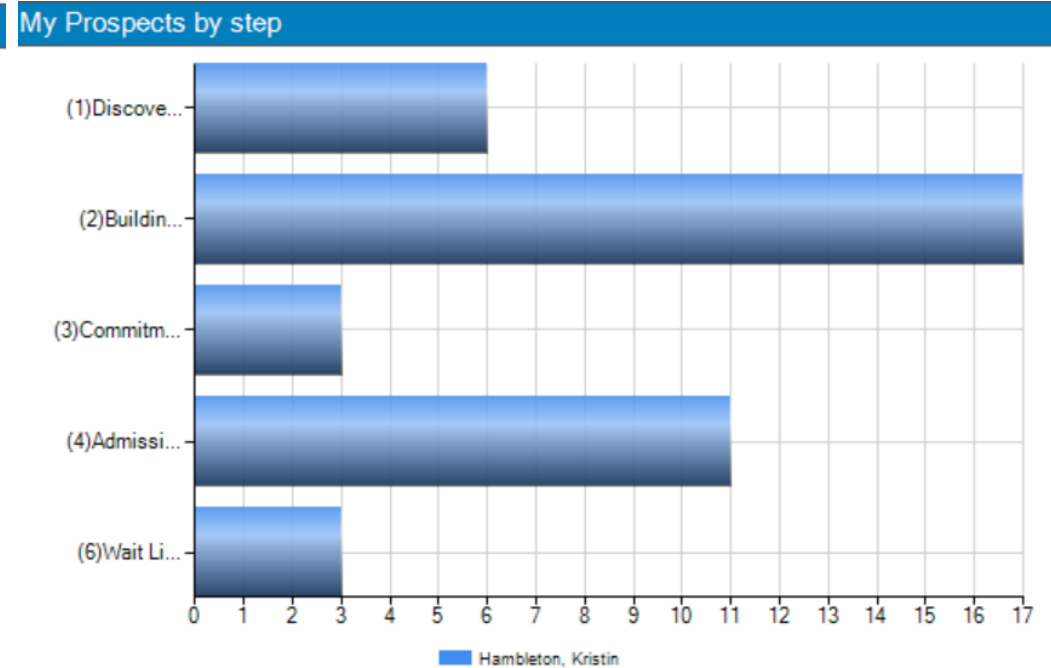
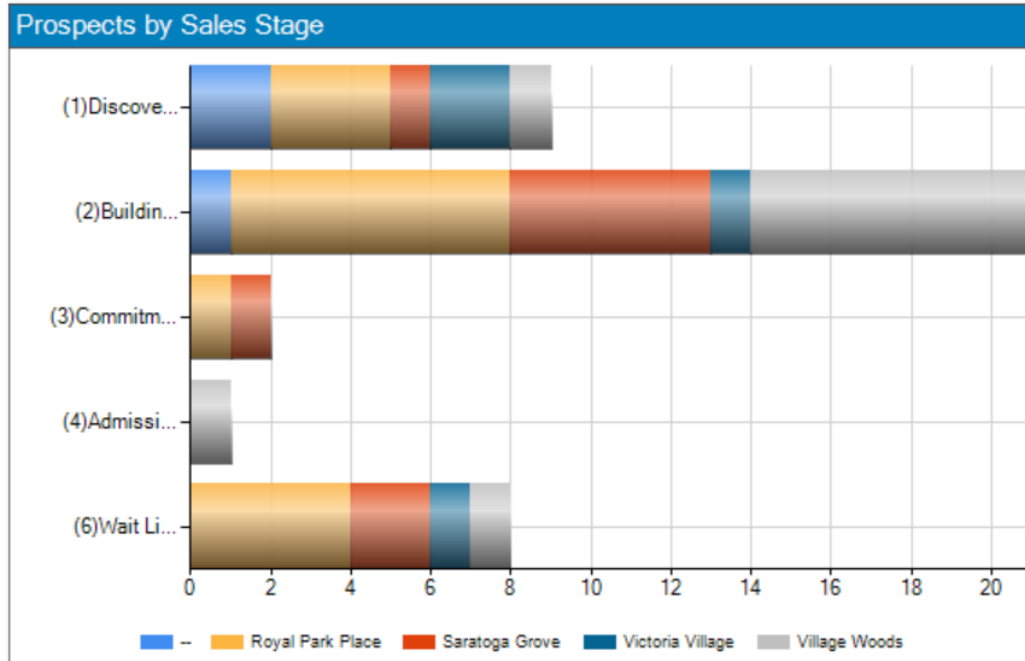
2. Building Rapport

3. Commitment

4. Admission in Process

Prospects follow your community's Sales Process

Each Workflow Step represents a different stage in the Buyer's Journey



Unlimited Layouts and Custom Data Fields

- Red/Yellow/Green
- User/Role/Community
- Experience Tailored to Individual

CONTINUUM CRM™

Dashboard | New Inquiries | Referral Partners | Contacts | **Prospects & Inventory** | Documents | Reports | Calendar | Email | Events & Advertising

List: My Open Prospects (Select column to add) [Group] [Filter]

Drag a column header and drop it here to group by that column

Prospect Name	Readiness Score	Due Date	Current Step	Community	Level of Living
Smith, Jane	64	5/22/2018	Reservation In Process	Courtyard Place	Independent/Residential
Smith, Mickey	59	6/5/2018	Discovery		
abbot, john	78	6/5/2018	Prospect: Watkins, Belle(Open)		
Johnson, Marjorie	60	6/6/2018			
Watkins, Belle	100	6/6/2018			
Johnson, Joe	84	6/6/2018			
Jank, A.W.	21	6/7/2018			
Judy Blum	98	6/8/2018			
Mantle, Mickey	37	6/8/2018			
Monroe, Shady	136	6/8/2018			
Rocco, Robert	85	6/8/2018			
James, Omasi	39	6/8/2018			
Jones, George	108	6/8/2018			
Chan, Jackie	66	6/11/2018			
Duck, Daffy	79	6/14/2018			

Details | Prospect Steps | Contacts | Related Recs | Attached Documents | Emails

Using Layout: Independent Living Sales

Prospect Readiness

Awareness/Education Score: 20	Desire Score: 45	Community Fit Score: 15	Need Score: 10
Rate Prosp. Understanding of Sr. Living: 4	Moving Timeframe in months: 6	Lifestyle Fit: 1	Number of Negative Feedback: 0
Rate Prosp. Understanding of Community: 4	Application Complete: 0=NO; 1=YES	Amenity Fit: 1	Brought Family to Site: 0=NO; 1=YES
Number of Relatives Living at Community: 1	Home Listed for Sale: 0=NO; 1=YES	Desired Level of Living Fit: 1	Financially Eligible: 1
Number of Resident Connections: 1	Toured Community: 1	Attended Resident Event: 1	Dined at Community: 1
Motivation: Socialization	Reasons Not Ready: Happy at Home, Need to Downsize, Bad Time to Sell	Motivation Notes: multiple selections and notes	Reason Not Ready Notes: multiple selections and notes
Readiness Score: 100			

Sale Information

Entrance Fee: \$0	First Person MSF: \$0
Second Person EF: \$0	Second Person MSF: \$0
Wait List Deposit: \$0	Total MSF: \$0
Total Entrance Fee: \$0	10% Amt. Paid: \$0
Application Fee: \$0	Balance Due: \$0
10% Deposit: \$0	RA Type: \$0

Move-In Information

Residence Unit/No: Building:	Res. Move in Date:	Community: Grandview Heights	Start MSF:
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Integration

Eliminate duplicate data entry
Provide visibility into and within other applications

Continuum CRM offers:
Custom API Integration

Webhook Integrations

Site Staff Chat, Hubspot, Act-On etc.

Office Application Integrations

Outlook

Word

Excel

GSuite Calendar

Web Lead Capture/Assignment

- Use on any Web or Landing Page for Digital Lead Capture
 - RSVP for Events
 - Submit Contact Requests
- Auto-populates Inquiries from the Web into Continuum
 - Emails an Auto Response to Inquiry
 - Assigns Inquiry to User or Queue based on Routing Rules
 - Email Notification of New Inquiry

[← Back to Events](#)

Monday, August 20, 2018

The Saint John's Bible Public Viewing

The Saint John's Bible is the first handwritten and illuminated Bible commissioned by a Benedictine monastery since the advent of the printing press more than 500 years ago. The one-of-a-kind Heritage Edition of the Saint John's Bible is a full-size fine art edition of the original manuscript created under the direction of Donald Jackson, the artistic director of the original manuscript. Each volume received finishing treatments by hand, and only 299 sets of the Heritage Edition were created.

As a participating organization of the Benedictine Health System, this special opportunity is brought to our community with support from Benedictine Health System to honor the 125th anniversary of our Sponsor, the Sisters of St. Scholastica Monastery, Duluth, Minn.



Event Registration

First Name*

Last Name*

Email*

Phone*

Number Attending*

Submit

Email Marketing and Tracking

Tracking and Statistics

- Delivery
- Bounces
- Opens
- Clicks

Unlimited Custom Templates

Schedule Email Delivery

The screenshot displays the Continuum CRM Email Marketing interface. At the top, the 'Email Body' editor shows a record type of 'New Inquiry' and a field label of 'Last Name'. The email body text is personalized with tokens like «Inquir>Last Name» and «Inquir owner:First Name». Below the editor, the 'Event Information' section shows details for a 'Demo Email' sent on 10/10/2016 at 11:46 AM. A table provides a summary of email performance metrics.

Sent	Delivered	Opens	Clicks	Bounces	Spam Complaints	Opt-Outs
11	91% (10)	55% (6)	36% (4)	9% (1)	0% (0)	0% (0)

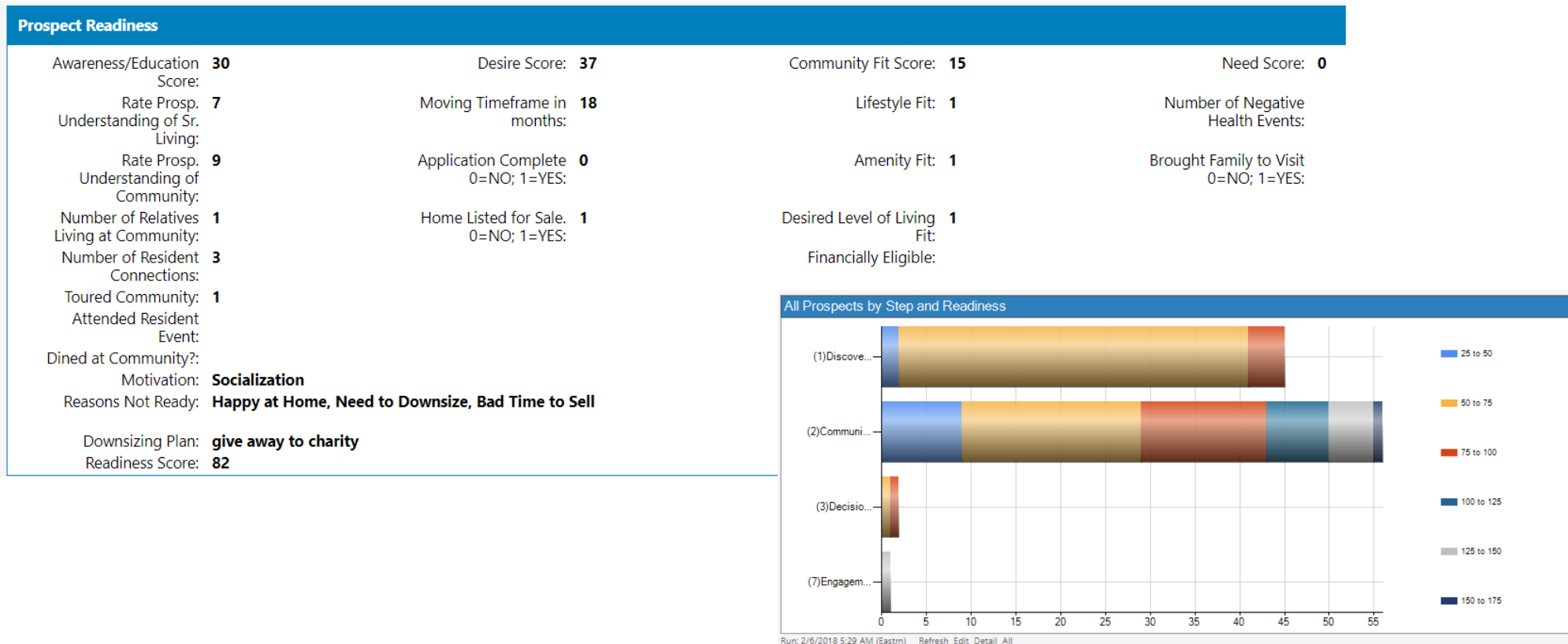
Below the summary table, the 'Recipients Emails' section lists individual recipients with columns for Contact, Account, Owner, Email, Status, Delivered, Bounced, Opens, Clicks, OptOut, and Spam Complaint. A green callout box points to the 'Clicks' column, highlighting individual results.

Individual Results of who Clicked, Opened and etc....

Contact	Account	Owner	Email	Status	Delivered	Bounced	Opens	Clicks	OptOut	Spam Complaint
Jerry	Continuum CRM	Hambleton, Kristin	jgrisham@continuumcrm	Sent	✓			1		
	Continuum CRM	Hambleton, Kristin	khambleton@continuum	Sent	✓		2	1		
	Continuum CRM	Hambleton, Kristin	sjoubert@continuumcrm	Sent	✓		4	1		
Blair	Continuum CRM	Hambleton, Kristin	bkaufman@continuumcr	Sent	✓		1	1		
Tod	Continuum CRM	Hambleton, Kristin	tmadderra@continuumcr	Sent	✓					
Lynn	Continuum CRM	Hambleton, Kristin	lmadderra@continuumcr	Sent	✓		2			
ott	Continuum CRM	Hambleton, Kristin	sfarmer@continuumcrm	Sent	✓		3			
n, Kristin	Continuum CRM	Hambleton, Kristin	khambleton01@gmail.co	Sent	✓		3			
View	Subject: Test	Continuum CRM	emailfail@fakeemail.xxx	Sent		✗				
View	madderra_other	Continuum CRM	tmadderra@salesnet.com	Sent	✓					

Prospect Readiness Score

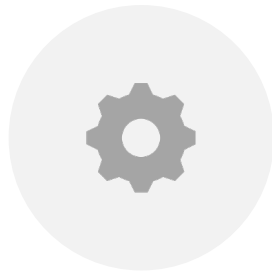
Objective Scoring Tool Based on Prospect Engagement



Successful User Adoption



**TOP DOWN
SUPPORT**



**USER FRIENDLY
CONFIGURATION**



TRAINING



**LEVERAGE
THE
TECHNOLO
GY**

Why Continuum CRM

CRM Functionality

Conforms to *your* culture

Customize *your*
terminology

Prompts user for next steps
in the buyer's journey

Project Rollout

Project Management

Learning Resources

Customer Support

Thank you!

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