Making It Stick:

Senior Living CRM Adoption

Let's face it: one of the least favorite tasks of senior living sales and marketing professionals is updating their lead management database or healthcare CRM. They are motivated to build relationships with seniors, families, and professionals. They are energized by personal interaction rather than administrative tasks. So there is usually resistance to entering data, updating notes, and documenting activities. However, for sales manager, this documentation is crucial to identifying trends, barriers, and opportunities and for creating effective strategies.

Here are some ways to reduce resistance and improve CRM adoption:

Create A User Advisory Board

Be sure there is representation of all user groups and stakeholders in the vetting and decision-making process of choosing the CRM. Create focus groups comprised of community, regional, and corporate sales and operations team members.

- ***Assess.*** Make a list of everything that the team likes and dislikes about what they are using. What works, what is clunky, ease of navigation, duplication of data entry, integration, reports etc. Make a "good, bad, and ugly" list with each stakeholder group and look for consistency. Ask each group to make a list of their "hopes and dreams" to access their mindset about making a change. Sometimes teams are more comfortable using a terrible system that they know and despise rather than making a change to a better solution because they are afraid they will not be successful and may even lose their job.

- ***Brainstorm.*** Create a wish list of features and functions that would make their jobs easier. Ideas include intuitive user experience to simplify data entry, automated lead integration with website, live chat and third party referral sources, email blasts, tracking of email clicks and open rates, notification of when a prospect is on your website, dashboards, goal setting, quick links to social media, integration with training resources and document libraries. Dream big—this is an important decision!

- ***Test.*** When you get to the testing stage with vendors, select a representative sampling from the advisory board to have them test the usage and provide feedback. Always include your lowest tech community user because if it is too complex at that level, then none of the fancy reports, dashboards, or bells and whistles will matter because you will not get the data you need. Provide each test user a lead to enter and test the steps throughout the sales process (documenting advances, activities, adding notes, scheduling tours and assessments, documenting a deposit, and converting to a move-in) for each vendor.

Senior Living **SMART**

Where Independent Providers Think Big, Save Big

WHICH CRM IS THE BEST?

The one that gives you the best adoption, best automation and best sales results.
Learn more:

CHOOSE A CRM THAT REFLECTS YOUR SALES CULTURE: Is your sales culture based on data? Do you manage your sales team based on call outs, inquiries and tours? Or is your sales culture based on relationship building? Different CRM's will support different sales philosophy. So be sure to define your sales culture before choosing a CRM.

CHOOSE FOR ADOPTION NOT FOR DATA: If your sales team at the community level is not using the CRM tool correctly and timely - the data will have no value. Choose a tool that is user friendly and intuitive, does not require multiple entries on different screens and allows access to multiple screens at once. User adoption will directly impact the benefit on the business.

SUCCESSFUL IMPLEMENTATION REQUIRES EXECUTIVE PARTICIPATION: Leadership team needs to be shouting the vision, purpose and value of the CRM adoption. Don't shortchange resources during implementation! Be the cheerleader and celebrate success.

DON'T GIVE UP! Any software implementation or change comes with many bumps in the road. Ensuring long term adoption requires perseverance especially when things are not going smoothly. Stopping or delaying implementation to regroup sends the wrong message to the community team.

Be Mindful Regarding Your CRM Selection

Here are some tips for choosing the right CRM for your senior living community:

- ***Compare.*** Take the feedback from the focus groups and look for commonalities of the various stakeholders to find common ground. It is important to select a CRM that meets *everyone's* needs. Each user group needs to get a win—something that saves them time, makes documentation easy, integrates systems etc.

- ***Alignment.*** One of the most important considerations is to align your new CRM with your sales culture. For example, if your goal is to motivate your sales team to spend time developing relationships with prospects and referral sources, the CRM should have the ability to measure and reward for that behavior. If your sales culture is more task, activity, and conversion ratio driven, select a CRM that provides that data in real time. Your CRM will not stick if your sales culture and training says one thing and your CRM measures something else. Your sales team will always behave according to the structure of the CRM rather than the culture and training.

Selecting the CRM Isn't Enough

Once you've made your selection, you need to prepare your team for implementation. Here's what to do:

- ***Training & Reinforcement.*** Budget generously for the rollout! If possible, use a training center to train small groups outside of the community setting to limit distractions and interruptions. It usually takes two to three days for the initial training. Day one is a reinforcement of your sales culture and training to create alignment with the new CRM. This can be done in a community setting. You'll then need a full day of classroom training using a test site to practice entering leads and explore all the features and functions. Day 3 can be either a half day or whole day training to demonstrate report functions, dashboards, and more sophisticated features, such as marketing automation. Users should leave this initial training feeling competent and confident. Schedule ongoing training sessions using remote screen sharing as well as open hours and help desks for questions.

- ***Data Migration.*** This is a great opportunity to clean up your data. Work with your CRM vendor to "de-dupe" or merge your duplicate records for leads and referral accounts. Decide if you want to migrate all of your data or move only those within a specific timeframe (for example over two years old) or with specific stages (e.g. leads labeled as "lost"). Providing a clean data set will go a long way in getting users onboard.