

# CASE STUDY:

*12 Oaks Senior Living Quadruples  
Lead Conversions After Embracing Inbound  
Methodology & Marketing Automation*

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Senior Living **SMART**

Inspired Marketing, Savvy Sales, Better Operations



## GOALS



- Create engaging website experience.
- Choose and implement marketing automation to streamline processes.
- Nurture marketing-qualified leads (MQLs) to sales-qualified leads (SQLs)

## RESULTS

- Website sessions up 78%.
- Successful HubSpot implementation now automates many marketing processes.
- MQL-to-SQL conversions quadrupled from 2019 to 2020



## The Challenge

Based in Dallas, 12 Oaks Senior Living brings over thirty years of industry experience to clients by providing exceptional third-party management and operation services to its senior living communities.

12 Oaks' industry success isn't without challenges, however, especially when it comes to digital marketing. One of the biggest challenges? Its website. How do you maintain a consistent brand identity throughout an entire site (and across multiple communities) while also delivering unique experiences that get prospective buyers to convert? And how do you entice early-stage leads to come back?

Speaking of leads . . . lead management was another challenging area. 12 Oaks had been diligently using a CRM. The problem? There wasn't an easy way to identify high-intent leads vs. "not ready yet" leads. So, in essence, all leads were being treated the same, which often resulted in frustration among team members due to the lack of move-ins.

Knowing it had to do something different, the 12 Oaks marketing and sales teams sought a streamlined method for segmenting leads and a more modern approach to their digital marketing efforts overall—an approach that would delight prospects and help nudge more of them into true customers.

*Enter Senior Living SMART.*



Sales-qualified leads (SQLs) are served up to the sales team. Meanwhile, marketing-qualified leads (MQL) are nurtured through automated email workflows, all in an effort to nudge them along until they're ready for a sales interaction.

To help identify which leads end up in the SQL/MQL camps, progressive profiling is used on all website opt-in forms. So once someone fills out one set of questions on a form, they are asked a *different* set of questions if they decide to download something else. With each download, more information is captured about a lead, which helps to further define their intent.

Debbie says, "We're learning about their motivation, their lifestyle, their timeframe, and what's important to them. And then based on that, we're creating these highly personalized journeys. So they're getting the right content at the right time."



## The Results

Since 12 Oaks relaunched its site in November 2019, it has seen a dramatic rise in the number of website sessions (up by 78%), SQLs, and MQLs. Yes, even during 2020, at the height of the pandemic. In fact, while MQL-to-SQL conversions in 2019 hovered around 3.4%, in 2020, it was 13.5%. That's quadruple growth!

This success has a lot to do with the fact that the sales reps are no longer wasting time sifting through *all* leads, trying to determine which ones are high intent. Instead, they focus solely on SQLs while the marketing automation nurtures MQLs. This, in turn, allows the marketing team the time to focus on doing more of what's bringing in quality traffic.



While these results might seem stunning, especially during a pandemic, the reality is that they are within reach of most senior living communities, provided the community is willing to embrace and truly follow the inbound marketing methodology.

At its core, inbound is all about understanding your buyers and empowering them to buy from you when *they're ready*. This involves giving them the content they need, when they need it—and using marketing automation to help segment and score leads and automate follow-up processes, like lead nurturing.

Debbie cautions that sales teams can sometimes be skittish of this approach, at least at first. After all, a CRM that used to serve up ALL leads will now serve up only sales-qualified leads—and there's often a big disparity between the number of all leads and SQLs. Some sales reps might initially be nervous by the concept of fewer leads, even if the leads are highly-targeted prospects.

“But what sales reps have to remember is that ‘more’ isn't always better,” Debbie says. “If you have fewer leads, but they're *better* leads and more of them convert, this will ultimately be better than having a huge bucket of leads where most don't convert.”

Eileen Aldridge, a Solutions Consultant with 12 Oaks Senior Living, agrees. “What Senior Living SMART has shown us is that it's much more important to create personalized journeys that will result in more sales-qualified leads,” she says. “We're thrilled with the results we've seen, especially given the pandemic. We're looking forward to seeing where the numbers go post-COVID.” ■





## Ready to take your digital marketing to the next level?

We can help your community attract better leads that actually convert into move-ins.

Get in touch and let's chat!



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