



A Checklist for Picking a Senior Living Marketing Automation Platform

The number of senior living providers using marketing automation platforms is rising, and whether getting started fresh or re-evaluating one's current platform, every operator benefits from following a checklist. The stakes couldn't be higher.

Marketing automation platforms help drive and handle more leads, making it easier for prospects to book in-person and virtual tours, and easier for senior living providers to handle marketing work for all locations.

Operators that use automation for their day-to-day marketing tasks open the door for their marketing teams to think critically and embrace creative work. There are several marketing automation platforms used in senior living. Here is a quick checklist to help senior living providers select a platform, with a full checklist available at the end of this article.

The top consideration for picking a marketing automation platform is integration with your CRM. There are several different classes of CRM integration. Three key ones are:

- **Bidirectional, native integration**
 - **3rd party connector**
 - **Manual CSV / daily batch uploads**
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The top consideration: integration with your CRM

By far, the most critical part of choosing a marketing automation platform for senior living is whether it integrates tightly with your CRM. Marketing drives leads to sales, and if the platforms aren't tightly connected, prospects and information can fall through the cracks.

There are several different classes of CRM integration. Three key ones:

- **Bidirectional, native integration.** This is the gold standard. Bidirectional, native integration ensures that contact information can be shared between the marketing automation platform and the CRM. The system then checks that task and related contacts, with the deal information synchronized so that the user can set fields.
- **3rd party connector.** 3rd party connecting services such as Zapier and LeadsBridge are great for connecting to platforms that don't have native connections. And while these platforms add an additional cost to the solution, operators often need them in order to connect their CRM to their marketing software in order to capture all data. These platforms will sometimes be contact-based, so it might be tough to update other objects like tasks, deals and custom fields between platforms.
- **Manual CSV/daily batch uploads.** At the very least, almost all platforms have some sort of CSV file download/upload capability to manage contacts. You don't want to be in this spot, because now you're adding labor where this was supposed to save labor.

How to avoid sticker shock: two key questions to ask

Some automation systems may prove costly. There are two key questions to ask when looking at price.

“Is there a progression of commitment?”

Many platforms will have a “progression of commitment” where customers can move from free trial to a monthly or yearly commitment. Some have no progression and ask for a yearly commitment upfront.

Want to avoid sticker shock? Here are the two critical questions to ask:

- **Is there a progression of commitment?**
 - **How does pricing increase/decrease?**
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“In our opinion, progression is important because it reduces the risk of platform selection,” says Adriel Michaud, VP of Sales and Marketing at ActiveDEMAND. “It hurts to find out that you picked the wrong platform or the wrong time to get into a platform when you're only two months into a prepaid, one-year contract. There is usually a discount for going yearly, but it's nice to have the option to start on a monthly commitment while you get your feet wet.”

“How does pricing increase/decrease?”

Most platforms go off contact count, but some will go by the community or the feature sets. It is important to check how many contacts you need before shopping around. You’ll get a more accurate picture of the cost that way.

As for onboarding or service costs, some platforms have mandatory onboarding fees that add to the first-year cost, while others are optional. Make sure you get a scope of work if the onboarding package is mandatory, as these charges might cover things you already get as a customer, such as access to support, onboarding videos and self-help supplies.

If you want the platform provider to build your campaigns for you, ask about the service costs.

5 key senior living features

From a high level, there are several feature categories that offer large differences between senior living marketing automation platforms. Five are:

- **Relationship support.** For many prospects, their child, relative or other trusted person may be involved in the choice of senior living facility. With support for these contact relationships, the automation is able to support more custom messaging that better touches on these relationships.

- **Appointment scheduling.** For senior living prospects, the first major action in the sales process is usually booking an appointment for an in-person tour, virtual tour or consultation. If the marketing automation platform can schedule appointments in the platform, operators have an easier path to tracking which marketing efforts are driving those appointments. They can then automate reminders and other activities for the appointment. Operators should ensure the platform natively integrates with the calendaring software, such as Google Workspace or Microsoft Office 365.

- **Multi-community support.** For providers that use a centralized marketing team to market for multiple locations, community and multi-tenant support are crucial. The best marketing automation platforms will have time-saving features such as the ability to create new accounts from templates, cloning campaigns and automation between accounts, which automatically applies branding at scale.

5 key senior living features for your automation platform:

- Relationship support
 - Appointment scheduling
 - Multi-community support
 - Call tracking
 - Text messaging
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- **Call tracking.** Because many prospects and their influencers will call to book their appointments, some marketing automation platforms offer built-in call tracking, recording and transcribing. Those features make it easier to score leads, quality check sales calls and determine what steps to take next. Calls, recordings and transcriptions should ideally integrate directly with the CRM as well, to save time for the sales team.

- **Text messaging.** Texting is a great way to remind prospects about an upcoming meeting and works well in other campaigns where prospects or their influencers prefer text messaging to emails. Some marketing automation platforms have texting capabilities built-in.

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JOE VAN KAMPEN

VICE PRESIDENT OF BUSINESS DEVELOPMENT
CITIZEN MARKETING

“Marketing automation is taking the senior living industry by storm in 2022, search volume for senior living communities is increasing, and with that more leads are flowing through to the communities,” says Joe van Kampen, Vice President of Business Development at CITIZEN Marketing.

“Integrating all of your campaigns with the CRM also supports the marketing team to know where the best places to spend their marketing dollars are. It’s a small price to pay, and there is a lot to gain.”



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