THE GUIDE TO MODERN MARKETING AUTOMATION FOR SENIOR LIVING

Linkmedia 360 SENIOR LIVING + enquire

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Now more than ever, competition in the senior living industry is driving organizations to search for competitive advantages. Rising paid media costs, long sales cycles, hard-to-track attribution platforms and leaky sales funnels are inflating cost-per-acquisition for net-new leads, net-new tours and net-new residents.

Should senior living communities aggressively fill the top-of-funnel while they continue to have a leaky funnel? The result is an overabundance of leads for any sales team or Executive Director to *effectively manage and drive occupancy.*

To combat rising cost-per-acquisition levels, sales and marketing teams must master workflows and in general, must work smarter, not harder, to scale conversion efforts. Gradual increases to conversion rates from the top-of-funnel down adds bottom-line value to all service lines. How do we improve conversion rates incrementally?

It may not appear evident on the surface, but there is a way to address and overcome the challenges described above with one investment: **Marketing Automation**

With the right *marketing* automation platform in place, senior living *organizations* can execute an *occupancy marketing* strategy focused on targeted messaging. The genesis of this targeted approach is targeting specific consumer personas in their buying cycle to ensure they receive personalized messaging, at the right time with a high degree of acuity.

This in-depth Guide will address the many facets of marketing automation. The following pages encompass the primary areas senior living providers will need to address before investing in and utilizing marketing automation to overcome unique and shared challenges amongst teams.
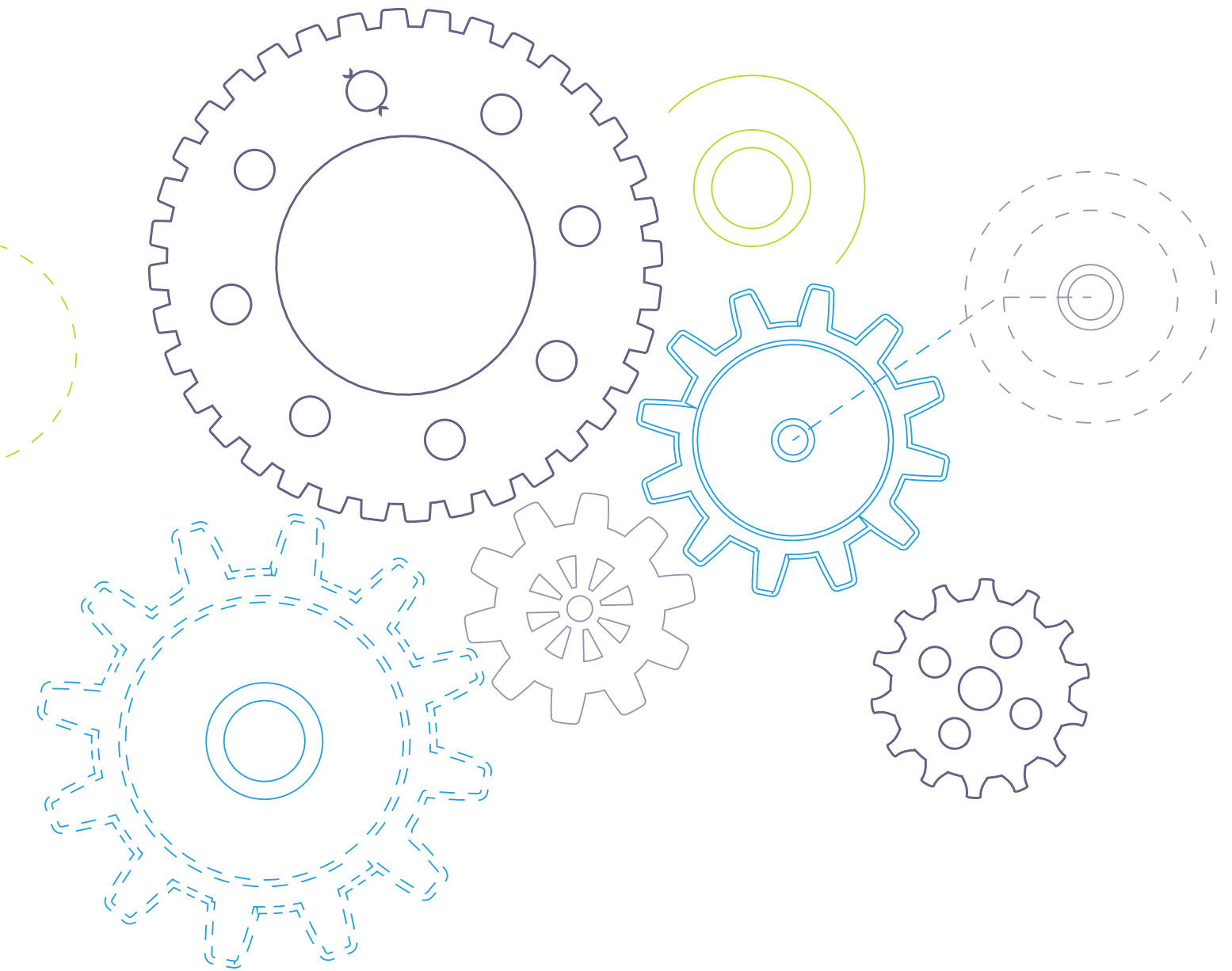
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NEEDS RECOGNITION

HOW DO I KNOW MARKETING AUTOMATION IS RIGHT FOR MY SENIOR LIVING ORGANIZATION?

Before your senior living organization invests in marketing automation, it must first understand if it will truly benefit from this technology. Therefore, to maximize value and reap the benefits of automation, organizations will need conclusive answers to the following questions:

Does our organization have a system that can deliver emails to prospects at scale?

☐ yes   ☐ no

Does our current system populate defined marketing channels within its CRM to attribute revenue to marketing tactics?

☐ yes   ☐ no

Does our call tracking system integrate with the CRM to notify the sales team when someone calls?

☐ yes   ☐ no

Does our organization have a system that can automatically send emails triggered by CRM properties?

☐ yes   ☐ no

Does our sales team efficiently maximize its time?

☐ yes   ☐ no

Does our organization properly manage lead flow?

☐ yes   ☐ no

Does our organization utilize the abundance of content curated for our audience?

☐ yes   ☐ no

Does our organization set up landing pages specifically for distributed content?

☐ yes   ☐ no

Does our organization currently have an online appointment scheduling tool for prospects?

☐ yes   ☐ no

Does our organization distribute gated content where a prospect provides their email address and name in exchange for gaining access to the content?

☐ yes   ☐ no

Does our sales team receive a CRM notification when a prospective resident is on our website? Downloads gated and/or premium content? Opens or clicks an email?

☐ yes   ☐ no

Senior living providers that answered 'no' to at least one of the questions above should consider investing in marketing automation. To simplify the need recognition process, we have divided the questions raised above and additional considerations into four categories.

1 COST + AFFORDABILITY

Senior living leaders understand the fiduciary duty to their respective organizations. Carefully weighing the pros and cons of any investment leads to greater levels of trust from board members, c-suite and directors.

Conversely, investing in a solution that is not fully utilized creates friction between teams and stakeholders, leading to future budgetary restrictions.

The team that recommends marketing automation to internal stakeholders must be confident about the ways sales and marketing can deploy automation to streamline efforts, grow revenue and generate cost-saving capabilities.

How much does marketing automation cost?

Due to the growing number of marketing automation solutions available to senior living providers, each with unique investment levels, it can be difficult to pinpoint generic pricing. To throw out a standard $1,000+ a month borders on negligence. Below are the primary considerations to help your selection team determine the affordability of marketing automation.

What level of support will be needed for my community?

How much will our organization be charged every time support is needed? Does my organization require availability 24/7, or will basic support suffice when a problem arises? Investment levels gradually rise based on the level of support required, so gauging how familiar teams are with this technology will help mitigate the rising costs that can feel tacked on with some automation platforms.

How many contacts will my team need to manage within our database?

Most marketing automation platforms have an introductory tier ranging from 1,000 contacts with costs rising incrementally based on the total number of contacts and other various features.

How many team members plan on regularly using our marketing automation investment?

Typically, automation platforms fluctuate in cost based on the number of users.

Will our organization be locked into a long-term contract for our automation platform?

Or, is there a degree of flexibility? Is a month-to-month commitment available? Align monthly or annual cost based on your organizations billing preferences. Equal parts flexibility and consistency are key components here.

What integrations are essential to leverage automation?

Ideally, your automation platform will natively integrate with other tools and technology platforms. CRM software, email software, call tracking and any additional integrations your marketing and sales team will find valuable.

How much training and/or consulting will be required to maximize this investment?

Consider user-friendliness and intuitiveness of the platform as it relates to onboarding and ramp-up. Generally speaking, sales and marketing teams can't afford to spend months onboarding before generating ROI through automation.

Ultimately, your senior living community's unique needs will dictate the upfront cost and sustained investment of marketing automation. Most solutions offer various pricing tiers and reflect the considerations above. By handling its due diligence, your team will improve its chances of receiving buy-in from necessary stakeholders.

Upon integration, begin modestly and as your organization leverages its investment to then scale upon full integration. Crawl. Walk. Run!

2 SALES TEAM PRODUCTIVITY

The "tire kicker" is an expression sales professionals know all too well. According to Enquire's *2018 | 2019 Annual Senior Housing and Post-Acute Sales and Marketing Benchmark Report,* sales teams utilizing marketing automation see an increase of 25% in productivity and a 21% decrease in sales cycle length. The "typical" senior living sales cycle is divided between sending and replying to emails, manual data entry, administrative tasks, internal meetings and more. Scrutinization against quota and increased levels of competition amplifies the mounting pressure a sales team can face.

Marketing automation alleviates this pressure by providing necessary sales support. This gives teams the freedom to be more productive, focused and attuned to the needs of prospects with the greatest likelihood to convert into move-ins.

The best part? Automation is tailored to minimize manual labor and provide solutions including, but not limited to:

- Syncing sales contacts from a CRM

- Automating email workflows and setting up drip campaigns

- Creating unique call tracking numbers for measurable channel attribution

- Scheduling and managing social posts

- Sending notifications to sales teams in real-time

- Building lead profiles the moment the initial digital touchpoint occurs
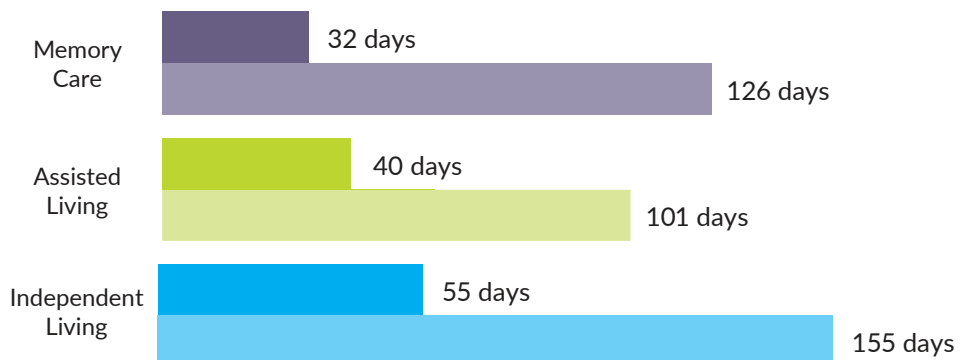
Automation streamlines time-consuming, albeit necessary activities without sacrificing personalization in the process. Instances of agonizing over the subject line and copy in an email to prospects are reduced once automation is leveraged. Additionally, automation performs these tasks at scale. This added productivity reduces the instances of sales teams having to worry about leaky sales funnels and priorities slipping through the cracks. Using automation, sales stays laser-focused on setting up visits with qualified leads, growing net-new leads, net-new tours, net-new residents and keeping the pipeline full, but manageable. Given the lengthy move-in cycle in senior living, productivity is paramount.

As senior living teams assess and analyze performance against their goals, if the opportunity to improve prospecting capabilities and gain greater control over lead flow are recognized, marketing automation and CRM investments become indispensable assets.

3 SALES CYCLE TOUCHPOINTS

It's no secret that the resident move-in journey is a lengthy one. On average, upwards of two years or more will pass (depending on the levels of care and services offered) before a prospective resident decides which community they will call home. Figure 1, from Enquire's *2018 | 2019 Annual Senior Housing and Post-Acute Sales and Marketing Benchmark Report*, provides specific context:

FIG 1: The average length of time (in days) from inquiry to tour for individuals who toured in 2018 and the average length of time (in days) from inquiry to move in for individuals who moved in 2018.

Memory Care	32 days
	126 days
Assisted Living	40 days
	101 days
Independent Living	55 days
	155 days

During this span of months or years, leads fluctuate between various states of interest. Keeping prospective residents genuinely engaged throughout this time is challenging to phrase it mildly.

Therefore, reducing the sales cycle wherever possible is necessary to surpass occupancy goals.

As communities take a step back to strategically reduce the length of time between move-ins, questions will likely be raised:

1 - *How often should our sales team schedule outreach with prospective residents before alienating them?*

2 - *What user behaviors signal interest beyond merely filling out a form?*

Marketing automation provides insights and answers for each question.

How? Upon collecting user behavior data, automation pushes notifications to teams in real-time. These notifications are based on various triggers which are customized to the sales and marketing processes within a senior living organization. Armed with this information, teams can be proactive with outreach the moment a meaningful activity occurs. While senior living organizations will have unique notifications and triggers specific to their identified personas and ideal residents, notifications that help teams shorten the sales cycle include:

- Downloading a gated content asset

- Signing up for a newsletter

- Subscribing to a community's content offerings

- RSVPing to events

- Clicking to specific pages on your website

- Opening and clicking on an email in your cadence

Contrary to operating from instincts, hunches and "gut feelings" sales professionals can leverage the metrics automation provides to inform the various touchpoints in the senior living sales cycle.

Communities that have identified gaps in their sales process don't have to onboard additional team members. An investment in automaton could provide the coverage needed to stay top-of-mind with prospects until behavioral triggers notify sales teams that a lead is ready and receptive to outreach.

4 CONTENT UTILIZATION

Content that is painstakingly researched, written and curated does not always find its intended audience. Unprecedented levels of competition and the tweaks search engines make to their algorithms contribute to how difficult it is for quality content to earn the same visibility it would have obtained even five years ago.

In fact, over 3 million new pieces of content are created daily. Even compelling, audience-centric content has a slim chance of standing out with so much competition vying for the same position as your community.

What's a marketing team to do?

The right automation platform serves as a hub for content distribution. Thoroughly researched, helpful, entertaining and even evocative pieces of content do not have to collect dust when automation is leveraged.

Using data points to build unique, customized profiles, automation identifies and serves a piece of content to the right prospect at the right time in the resident journey. When distributed, that content will be personalized to the interests and needs of the individual engaging with the senior living community after behavioral triggers are activated. Several forms of content distribution are possible through automation:

- Social media posts

- Web advertisements including pop-ups

- Blog posts

- Infographics

- Video content

- Among other relevant resources shared from email cadences

For senior living marketing teams that have measured the reach of content offerings and found its results and/or engagement lacking, marketing automation could prove a sound investment. Marketing automation breathes new life into content marketing with the help of personas, which will be addressed during the 'Solutions' and 'Strategy' portions of the Guide.

WHAT MARKETING AUTOMATION IS NOT

While marketing automation can help senior living leaders accomplish a myriad of goals, it is not a cure all and does have certain limitations that should be understood when investing in this solution.

Let's clear up several misconceptions surrounding marketing automation to help senior living marketing and sales leaders maximize its utility for their benefit:

Marketing automation is not robotic - Human intervention is still required to properly execute an automation platform. Marketing automation is not a "schedule it and forget it" solution. Regularly scheduled maintenance and monitoring will be necessary to maximize its capabilities. If teams utilize automation without close collaboration, marketing automation will amplify issues in the sales process that existed prior to its investment.

Marketing automation is not "just" an email platform - Marketing automation is a sales enablement tool. Relying on software to automate, personalize, target and measure repetitive digital marketing tasks, modern marketing automation platforms serve a variety of functions. Email merely scratches the surface of what automation is capable of transforming in an organization.

Marketing automation is not a "fix" for lead flow - Automation helps teams manage and prioritize leads. However, for this support to take place, a sales pipeline must first exist. Marketing automation does not work like a magic wand. Lead generation is necessary prior to an investment in a marketing platform.

Marketing automation is not fully automated - Automation requires a "driver" to keep tabs on workflows, making improvements when needed, not requiring rigorous staffing. Employing and/or assigning a tech savvy individual to oversee automation will help organizations yield every available benefit taking full advantage of this technology.

Marketing automation is no different than any other platform in that several factors should be considered, including:

- Business objectives
- Capability requirements
- Organization goals
- Current technology

A wide range of marketing automation options exist, from large enterprise solutions to smaller platforms with less functionality. As a best practice, find a platform that will handle all of your current needs, as well as, give your marketing team room to grow and explore new tactics as their comfort level increases.

Additionally, choosing a marketing automation platform that mirrors your marketing and sales process is critical. Marketing automation should help accelerate your results, not disrupt the sales process.

A consideration that will likely be addressed when marketing and sales teams discuss solutions includes: Do I need a CRM for marketing automation to be a powerful tool?

Integration is critical to remain competitive in today's senior living landscape. A CRM that is integrated with a marketing automation platform allows you to track a lead's behavior and online engagement with your organization. Understanding the big picture helps you allocate marketing dollars and personnel so you can budget time and energy efficiently throughout the entire resident journey.

In addition to handling all of the communities' email needs, marketing automation is also ideal for content distribution, such as newsletters, blog posts or other industry targeted resources. This content should not be used to directly sell your products and services, but to offer valuable information that may be used in the decision-making process.

Once you have begun distributing content, use your MAP (marketing automation platform) to aggregate metrics from lead forms, offers, blog posts and emails and then use the data to reevaluate your strategy.

?

Which offer converted the most leads?

Where do you see an increase in web traffic?

Which landing page, call-to-action and lead capture combination produces the best quality prospects?

Which emails have the highest open and CTR?

Use your answers to affect future efforts. A marketing automation platform provides additional solutions that can help amplify the efforts of the marketing team including:

Social Media - Schedule and distribute content across multiple social media platforms. Track website traffic and asset engagement to understand and improve website traffic. Social distribution increases your audience of prospects while marketing teams learn which offers or assets drive the greatest conversions.

Ads and Pop-Ups - Utilize advertisements such as pop-ups and website banners to serve dynamic content to individuals perusing your website.

Text Messaging - Innovate and improve prospect engagement with automated responses and information delivery via text.

Reporting - Improving visibility into lead attribution, cost-per-lead and conversion rates by referral source enables your team to focus outreach efforts on the most desirable referral sources, or identify new sources.

Email Outreach - Automate emails based on different triggers in your sales and marketing process.

The essence of strategy when deploying marketing automation is not only knowing what to do, but also what not to do. Prioritizing the steps required and people involved during implementation makes all the difference between success and failure.

Listed below are three strategic considerations to make before deploying a marketing automation platform.

The people, process and technology at a senior living community are (by no surprise) at the core of a successful strategy.

STRATEGY #1: HOW DO SALES AND MARKETING TEAM WORKFLOWS CHANGE AND EVOLVE:

Before silos can be broken down between sales and marketing teams, they must first think like architects. Think through the following three areas before strategically scaling automation across your organization:

Identify goals and build out your strategy
(build it)

Go back into your automation platform and monitor activity
(watch it)
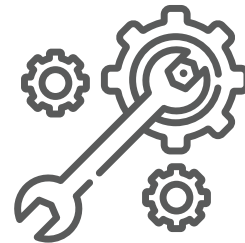
Identify areas to improve content offerings or user engagement where necessary
(optimize it)

These revamped workflows allow for cohesive collaboration and improved levels of communication. Additionally, the reporting metrics created from these workflows allow for reports that cover the entire expanse of the sales funnel.

Prior to these workflow changes, sales and marketing teams would have insight into a sliver of the sales funnel. Now, with these changes in place, teams are sharing data and insights across the resident's journey, from the initial point of contact to the time of a move-in (and every major milestone and touchpoint in between).

STRATEGY #2: HOW SHOULD SEGMENTATION BE USED TO TARGET PROSPECTIVE RESIDENTS:

Workflows are set with sales and marketing teams in alignment. This alignment allows for a deeper understanding of target personas and the tactics tailormade for engagement.

For example, if an adult-child influencer (ACI) does not engage with a specific piece of content, your team can substitute it for another piece of content and measure how the engagement changes.

In the circumstance your community is not familiar with what a 'persona' is exactly, we will provide a definition:

> *Persona:* A persona represents a cluster of users who exhibit behavioral patterns in their purchasing decisions, use of technology or products, customer service preferences, lifestyle choices and the like. Behaviors, attitudes and motivations are common to a 'type' regardless of age, gender, education and other typical demographics.

The two primary personas in senior living are the resident him/herself and the (ACI). Additional personas can be created, but the two previously stated address the ideal prospects senior care providers will want to engage with throughout the resident journey.

To keep a steady flow of content, senior living marketing teams can dissect a larger content asset into smaller, more manageable pieces to be used during specific points in the resident journey. The method of separating dense content assets is called **atomization.**

Using atomization, teams can identify specific areas in larger content projects that resonate with an identified persona and let automation do the rest of the work. That content will then feel customized and tailored to the individual, which engages with prospects at scale.

STRATEGY #3: HOW MUCH CONTENT SHOULD BE WRITTEN TO SUPPORT MARKETING AUTOMATION:

Content should be created for each stage in the resident's journey/buyer's funnel. This is not factoring a sheer volume of content created so much as it is ensuring that content created (or atomized) resonates with personas through each unique milestone in the resident's journey.

The key to good content is understanding your audience. Content should not be used to sell your offerings and services, but to provide valuable information that may be used in the decision-making process. For example, provide content that helps a prospective resident in their daily life or provide an adult daughter content that helps solve a problem she is likely encountering.

CREATE CONTENT FOR PERSONAS IN THESE RESIDENT JOURNEY STAGES

Stage 1: Initial Discovery - Initial discovery is the moment an older adult recognizes the need for assistance. Conversely, this also applies to older adults who are looking to change their lifestyle or make an improvement to their quality of life. In this instance, a combination of social activities and amenities are top priorities. During this stage, both prospective residents and their adult children (ACI) will have questions. These personas will conduct research to have concerns addressed and will likely turn to search engines for assistance. It is paramount your community's website is highly visible on search engine result pages (SERPs) and compelling enough to earn a click.

An emphasis in search engine optimization (SEO) and overall web presence is essential. The content could take the form of blog posts, videos or infographics. It must first and foremost be helpful and engaging enough to entice both ACIs and residents to return to your website throughout the resident journey to nurture trust.

Stage 2: Initial Outreach - This stage in the resident journey is made possible once a persona becomes familiar with a community's levels of care. A prospective resident or ACI could discover a community from a paid ad, piece of content, or social post. Once trust has been established a call, email, form fill, etc. is completed.

After initial outreach, automation continues to send personalized content to further build trust, at the discretion of the sales team and the alerts/prompts they will obtain through a CRM. Between initial outreach and the eventual visit, lead scoring will help sales and marketing teams assess interest levels and will help them determine prospective residents.

Stage 3: Visit or Community Tour - After initial outreach and a lengthy period of research and information gathering, a prospective resident and/or ACI will feel comfortable to visit a community to gain a sense of what life will be like upon moving. Once the visit has concluded, post-tour/post-visit content will be distributed via the automation platform or dedicated follow-up.

Content shared is based on the unique interests and lifestyle preferences of the prospective resident. Depending on the comprehensiveness of the notes logged into a CRM, teams can be granular in how catered the content feels to the individual. This content could take the form of invitations, sharing reviews/ testimonials, case studies, or content created to that specific individual.

Stage 4: Final Selection - Once a prospective resident or ACI is ready to make a decision, the quality of the content or the bespoke nature of the content itself will come secondary to the logistics of calling a community home. Healthcare costs and affordability are heavily considered and scrutinized against a resident's budget and lifestyle needs.

Content shared in this stage needs to be concise, clear and easily understandable by all parties viewing the content. Accuracy is a key component. If costs and benefits are inaccurate, it will likely be a deal breaker. If sales and marketing teams feel they have created enough content topics to address each of the unique stages in the resident journey, they can confidently let automation support them as they prioritize prospect outreach accordingly.

IMPLEMENTING MARKETING AUTOMATION

Communities can implement marketing automation without all the 'bells and whistles.' As automation continues to drive results, additional components can be layered into the investment, growing in sophistication and granularity as an organization advances in the digital marketing maturity curve.

In the examples below, senior care providers will gain a sense of the compounding nature of automation as it scales across organizations.
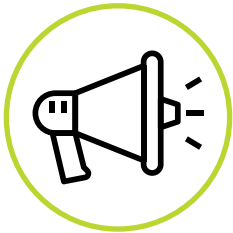
BEGINNER
ONE TO MANY

- Email
- Content
- Social

ADVANCED
ONE TO SEVERAL

- Email
- Content
- Social
- Activity Trigger/ Demographic Trigger (based on titles, roles, etc.)

EXPERT
1:1 COMMUNICATION

- Reporting
- Email
- Content
- Social
- Activity Triggers (lead scoring)
- Customized Landing Page Creation (with response tracking and forms designed to convert)
- Review Solicitation, SMS and/or Text Message Alerts (real-time feedback and keeps leads engaged) (post-tour follow-up)
- Call Tracking
- Dynamic Number Insertion (can see the channel source of the phone call that is triggered at the time of conversion) – Increased Levels of Personalization
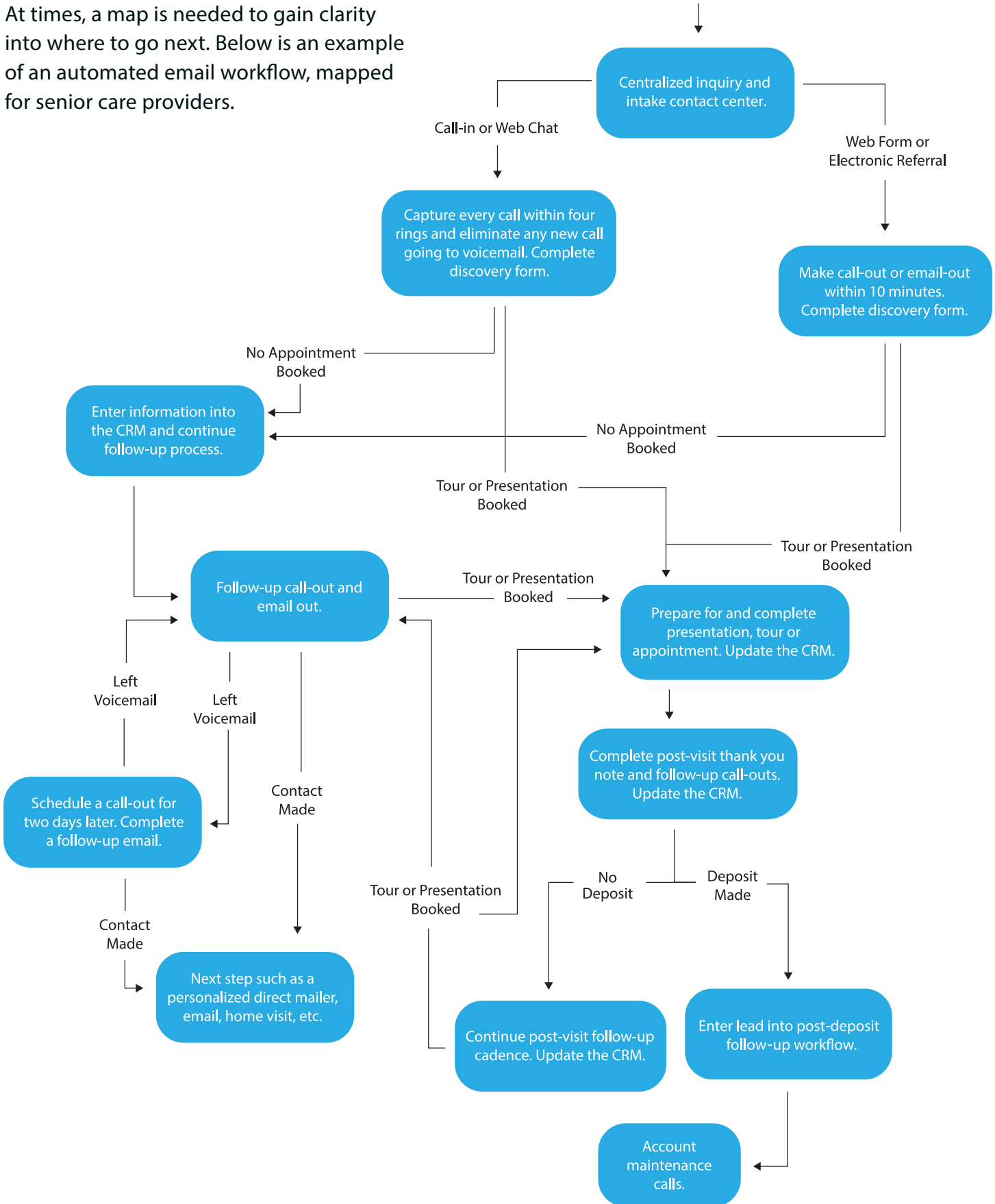
MAPPING MARKETING AUTOMATION

At times, a map is needed to gain clarity into where to go next. Below is an example of an automated email workflow, mapped for senior care providers.

Centralized inquiry and intake contact center.

Call-in or Web Chat

Web Form or Electronic Referral

Capture every call within four rings and eliminate any new call going to voicemail. Complete discovery form.

Make call-out or email-out within 10 minutes. Complete discovery form.

No Appointment Booked

No Appointment Booked

Enter information into the CRM and continue follow-up process.

Tour or Presentation Booked

Tour or Presentation Booked

Follow-up call-out and email out.

Tour or Presentation Booked

Prepare for and complete presentation, tour or appointment. Update the CRM.

Left Voicemail

Left Voicemail

Contact Made

Complete post-visit thank you note and follow-up call-outs. Update the CRM.

Schedule a call-out for two days later. Complete a follow-up email.

No Deposit

Deposit Made

Contact Made

Tour or Presentation Booked

Next step such as a personalized direct mailer, email, home visit, etc.

Continue post-visit follow-up cadence. Update the CRM.

Enter lead into post-deposit follow-up workflow.

Account maintenance calls.

CLIENT USE CASE

The success story below outlines how a senior living provider leveraged both CRM and marketing automation to reduce the workload for sales teams while gleaning insightful feedback from customers that improved prospect engagement.

OVERVIEW

National Church Residences, based in Columbus, Ohio, is the largest provider of affordable housing for seniors in the United States. National Church Residences is an innovative leader in integrating housing, health care and other supportive services for seniors, families and others who need us.

TOOLS

Investment in technology saved the sales team time so they can focus on nurturing relationships.

- Enquire CRM
- Enquire MAP (marketing automation platform)
- Integrated business analytic program

BENEFITS

Leadership obtained real-time data about sales processes and operations and saw:

- Reduced workload for sales team
- Increased prospect engagement
- Better sales productivity and results
- Improved insight into customer feedback

CHALLENGE

Many sales and marketing functions were manually executed, which increased the workload for team members. Real-time feedback was nearly impossible to capture and without automation there was no systematized way to solicit feedback and aggregate results.

SOLUTION

- National Church Residences implemented a real-time survey for all individuals in the CRM who visit each community. Once a sales activity for the visit is completed in the CRM, marketing automation delivers a text and/or email with a customized survey asking the visitor about their experience.

- Along with uploading survey results to the CRM, real-time trend reports were created to monitor the performance for each community.

IMPLEMENTATION

1. Determine Automation
With your CRM integration, create triggers for surveys based on specific sales actions.

2. Display Results
Survey forms should be integrated with the CRM to show complete results of each respondent.

3. Create Design Triggers
Workflows were set up based on whether or not the CRM profile had phone or email address so information could be successfully delivered.

4. Evaluate Results
Set up trend reports and review feedback to communicate to your sales and operations teams.

"WE HAVE BUILT A LOT OF CREDIBILITY WITH OUR C-SUITE AROUND OUR MARKETING AND SALES CRM REPORTS AND THEY ARE USED NOW FOR LEADERSHIP AND OPERATIONAL DECISION-MAKING."

Cindy Young -
VP of Marketing and Public Relations at National Church Residences

AUTOMATE TO DOMINATE: CLOSING THOUGHTS

Senior living sales and marketing leaders have unique challenges to overcome, with team alignment sounding like a lofty and admirable, yet unattainable goal. Until now. Automation has irrevocably changed the way sales and marketing teams connect and communicate. Not only is marketing automation a wise investment when properly scoped - it quickly becomes an asset that improves sales performance and accelerates results.

Automation is more than a system for distributing emails. With the right platform in place, senior care providers will track its immediate contribution to the bottom line.

It is our hope that after your senior living organization invests in marketing automation it overcomes its challenges and obtains transformative results. We also hope this Guide serves your organization as a helpful resource from the selection process to implementation. Of course, we're also here to help!

For questions regarding integrated digital marketing and analytics solutions, please contact Evan Horomanski from Linkmedia 360.

ehoromanski@linkmedia360.com

For questions regarding marketing automation or CRM platforms, please contact Delaine Blazek from Enquire.

delaine.blazek@enquiresolutions.com

About Linkmedia 360

Linkmedia 360 is an integrated marketing agency for senior living and life plan communities. We create, implement and report on custom digital marketing programs and media channels to drive tangible results - fueled by our passion for analytics & data science. We help providers achieve their census goals with industry advisement and timely execution in localized marketing channels. Experience a refreshed digital marketing approach that uses data integration to close the loop on sales, marketing & operations accountability for your brand.

About Enquire

Enquire is the premier CRM, marketing automation and contact center solution provider in senior living and post-acute care. With the vision to improve the experience for prospects and family members through customer service centric products paired with cutting-edge technology and analytics, Enquire's cloud-based software systems are specifically designed for seamless sales and marketing activity. To learn more about Enquire's solutions for senior living and post-acute care, visit enquiresolutions.com