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

As your senior living organization considers investing in marketing automation, it must fully 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.

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