



OPTIMIZING THE SENIOR LIVING BUYER'S JOURNEY

A complete guide to using KPIs along the buyer's journey to drive better results.



TABLE OF CONTENTS

Introduction	3
The Modern Senior Living Buyer's Journey	5
Using Omnichannel Marketing to Streamline the Journey and Shorten the Sales Cycle	6
Intent Establishing Objectives Using Consumer Mindset	7
KPIs Measuring Effectiveness to Enhance Performance	7
Step by Step Through the Senior Living Buyer's Journey	8
Passive Awareness	9
Active Awareness	11
Interest	13
Engagement	15
Evaluation	17
Action	19
Committment	21
Loyalty	23
Conclusion	25





INTRODUCTION



Thank you for downloading *Optimizing the Senior Living Buyer's Journey* by Attane. In this eBook, we'll take our own journey through the senior living buyer's journey to help you:

- Understand the mindset of the senior living buyer along each step
- Implement omnichannel tactics to streamline your marketing
- Measure effectiveness with proven Key Performance Indicators (KPIs)
- Decrease your sales cycle length

Each buyer takes a unique journey from their first awareness of a product to their eventual purchase. Buyer journeys establish a comprehensive framework of this journey to help sales and marketing professionals fine-tune and streamline the sales process, and ensure prospects are receiving relevant, strategic, and appropriate communication and education as they move in and out of each step. Effective buyer journeys are tailored to specific industries, personas, and products to meet each prospect's unique situation and needs.



THE MODERN SENIOR LIVING BUYER'S JOURNEY

Due to a lengthy sales cycle (according to Enquire, the average senior living sales cycle from initial inquiry to move-in can be upwards of 155 days) and the diverse set of parties involved in the process, the senior living buyer's journey is one of the most challenging to successfully map and effectively execute.

The decision to move from a single-family home to a senior living community or residence is one of the biggest choices anyone will make in their lifetime, made only after ample research has been completed and a trusted relationship has been built. Potential customers don't become informed buyers overnight. From discovery of community service offerings to finding the right pricing for available floor plans, the journey towards a sale can be taxing for a caregiver, adult child or senior. They require consistent messaging and support as they self-educate and build trust with your community.

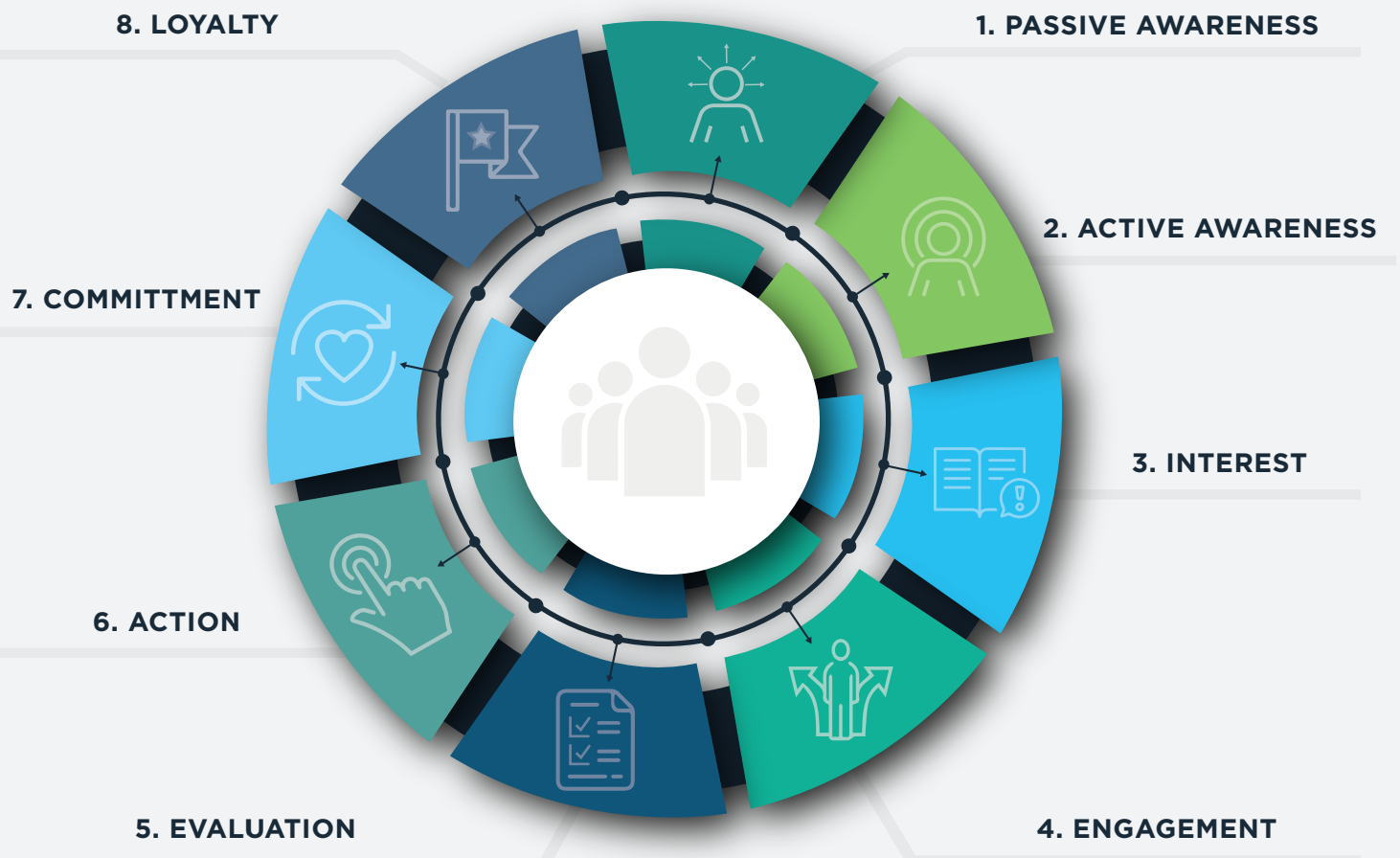
In addition to industry-specific challenges, modern buyer journeys are also being affected by the shifting consumer landscape and increased adoption of technology. The majority (70%) of the buyer's journey now takes place before a buyer ever reaches out to sales (SiriusDecisions). Senior living sales counselors and marketers alike have to embrace technology to build personal relationships and help prospects make a life-altering decision using mainly online platforms.



USING OMNICHANNEL MARKETING TO STREAMLINE THE JOURNEY & SHORTEN THE SALES CYCLE

Having a deep understanding of each step of the buyer's journey is essential for creating an intuitive and seamless experience. With an omnichannel marketing approach that uses perceptive data and technology to deploy key messaging applicable to where each buyer is in their journey, you can encourage appropriate, timely movement that works to shorten the sales cycle.

The 8 basic stages that make up the modern senior living buyer's journey are:





On the following pages, we'll take an in-depth look into the unique features that define each of these steps, including:

INTENT

Establishing Objectives Using Consumer Mindset

The intent of each step is built around the mindset of the consumer. What information or education do they need to be served so the process doesn't stall? Using thought process to establish objectives ensures that their needs are being addressed – making the process simpler for them and more valuable for you.

KPIs

Measuring Effectiveness to Enhance Performance

It's important to measure more than lagging indicators of performance, like occupancy, to continually optimize your sales and marketing strategy.

The backward-looking nature of lagging indicators means insights may come too late for real-time adjustments. As we move through the journey, we'll use leading indicators, such as KPIs, to help measure the 70% of the sales process that happens before inquiry and through to move-in. With this knowledge, you can build a better understanding of performance, predict likely future outcomes, and decrease the length of your sales cycle.



**STEP BY STEP
THROUGH THE
SENIOR LIVING
BUYER'S
JOURNEY**

1 PASSIVE AWARENESS



Intent: Increase the visibility of your brand

During the Passive Awareness stage, consumers have been exposed to your community but have passive knowledge of your brand that varies in depth, detail and accuracy. Your objective is to create a lift in unaided awareness by focusing on their quality of living needs and addressing common statements such as:

- I'm too young to move into a community.
- I don't need rehab or to be babysat, so why would I move out of my house?
- I have too many memories here to leave this home.

Key Performance Indicators

Total number of impressions (online and offline)

Marketing Tactic Considerations

- Print/ traditional media
- Direct mail prospecting
- Video
- Social (paid)
- Digital display



OMNICHANNEL TIP

Drop a Direct Mail (DM) piece that is heartwarming and discusses the importance of family time, feeling nurtured, and being at ease and “at home.” The DM piece should have a CTA to come in for a tour and start conversations that might feel intimidating; consider using messages such as, “We’re ready to welcome you, when it feels right for you.”

Then launch a matching online display campaign to complement the DM piece. In the display ads, direct users to your website’s Community Life page and Gallery pages that showcase videos of your community to create an interest in what life at the community might look and feel like.

ACTIVE AWARENESS



Intent: Encourage interest in your community

During the Active Awareness stage, consumers are familiar with your brand and actively exploring their options. Your objective is to incite interest-oriented action with community awareness tactics.

Key Performance Indicators

- Total number of impressions (online and offline)
- Website traffic
- Bot impressions
- Online reviews

Marketing Tactic Considerations

- SEO
- Search (organic and/or paid)
- Digital display
- Social (owned and/or paid)
- Public relations initiatives

OMNICHANNEL TIP



Create a well-rounded search campaign with engaging, educational content. According to Google, there are 6,000 searches every hour related to senior living, and we know that potential residents and their families are searching both for living options and for answers about the entire process. Optimize your web pages for common searches like “assisted living near me,” “when is the right time to move to independent living,” and “what if my parents have different health care needs” to ensure your community stays on their mind throughout every search.

3 INTEREST



Intent: Trigger measurable messaging

During the interest stage, consumers have expressed an early interest in your community but have not yet provided personally identifiable information. Your objective is to track activity without an information exchange.

Key Performance Indicators

- Website traffic (any source)
- Landing page traffic
- Click-through rate (paid and organic)
- Social post reactions
- Social follows/page likes
- Featured content engagement
- Bot conversations

Marketing Tactic Considerations

- Retargeting
- Website optimization
- Content/experience personalization



OMNICHANNEL TIP

In the early stages of their discovery, caregivers, seniors, and their adult children are searching for information and dependable resources to educate themselves. Users in these key demographics (ages 55-64+) are more than twice as likely to engage with branded content on social media compared to those 28 and younger.

Social media provides a platform for distributing content, building relationships, and fostering connection. Providing users with the information they need to be better informed gives them the tools they need to move from being interested to fully engaged. It's crucial to develop content to stay top of mind and build trust, so when customers want to engage further, they come to you, not your competitor.

4 ENGAGEMENT



Intent: Build trust and loyalty by becoming an expert partner

During the Engagement stage, the consumer is ready to engage directly with the community via their preferred method of contact. Your objective is to gather personally identifiable information and nurture your newly generated lead.

Key Performance Indicators

- Form completions
- Inbound phone calls
- Business reply card returns
- Event registrations
- Walk-ins
- Average time in phase
- Average time from inquiry to initial contact

Marketing Tactic Considerations

- Call tracking
- Website user experience management
- Content planning



OMNICHANNEL TIP

Implement an onboarding automated email program to stimulate further interest in the community.

These email programs are designed to nurture and educate leads about the community and industry. They also provide multiple interactive engagement points that can be tracked and scored in the marketing automation platform via integration with your website, which is easily viewable by the sales team. Digital journey analytics translate what's important to that lead, such as floor plans or services and amenities, into a timeline storyboard for sales counselors - allowing them to have more targeted, intimate conversations once an appointment has been scheduled. This program can be designed to target different audiences, such as the senior, adult child influencer and professional influencer.

EVALUATION



Intent: Overcome objections and aid in decision-making

During the Evaluation stage, consumers have engaged with your community and are gathering more in-depth information. Your objective is to aid in decision-making by delivering consumable content and scheduling appointments and tours.

Key Performance Indicators

- Reengagement with featured site content (returning visitors)
- Ongoing website visits
- Digital retargeting click-through rate
- Lead nurture emails opens and clicks
- Initial tour/appointment set
- Lead-to-tour conversion rate
- Average time in this phase

Marketing Tactic Considerations

- Lead nurturing email automation program
- Website user experience management
- Direct mail retargeting
- Digital display retargeting
- Lead scoring



OMNICHANNEL TIP

Don't give up on prospects after their first website visit - use retargeting to reengage quality prospects who have already shown an interest to ensure they're reminded of all the benefits of your community.

The majority of users who visit your website won't convert to a lead during their first engagement. It's important to keep your community top of mind for prospects, even after they've left your site. Serve up personalized ads to past nonconverting website users, allowing them to return and reengage with content to drive a form fill or phone call. Consider enticing users to return to view fresh content, like viewing the photo gallery, reading testimonials, taking a virtual tour or checking out the floor plan fit calculator.

ACTION



Intent: Interact 1:1

During the Action stage, consumers become increasingly interested in your community and feel informed about their options. Your objective is to have personal interactions and encourage event attendance.

Key Performance Indicators

- Re-inquiries
- Appointment attendance (initial and subsequent)
- Event attendance (virtual or in-person)
- Completed contact (email, completed phone-outs, SMS texts)
- Average time in this phase

Marketing Tactic Considerations

- Lead scoring
- CRM analysis
- Virtual tours
- Event surveys
- Appointment no-show email automation program



OMNICHANNEL TIP

As a sales professional, planning your daily tasks can sometimes be easier said than done. Especially with limited time and resources, it's important to identify your best leads in a faster period of time and reduce touch points.

Use historical depositor data to hone in on which of your current leads has the highest propensity to move in and ensure the best leads get your focus. A lead scoring model scores your entire lead database by how fit or qualified they are to live at the community, how engaged they've been with sales activities, and how digitally active they've been. View leads who were temporarily stagnant and have reengaged with the community to see if there's an opportunity to schedule the next activity.

7 COMMITTMENT



Intent: Reference why they chose your community as their future home

During the commitment stage, the consumer knows they want to live at your community, but is seeking affirmation of their choice. Your objective is to retain their deposit.

Key Performance Indicators

- Deposit (waitlist and 10%)
- Deposit cancellations (negative)
- Closings
- Move-ins
- Tour-to-deposit conversion rate
- Deposit-to-move-in rate
- Gestation period

Marketing Tactic Considerations

- Move-in support
- Partner referrals
- Move-in-depositor email automation program



OMNICHANNEL TIP

You've closed your latest prospect, but the work isn't over. Keep your hard-earned depositor excited about their decision with the move-in depositor automated email program designed to nurture future residents as they prepare to move. They often have questions surrounding rightsizing, decorating smaller spaces, how to make the most out of their new community and how to get to know their future neighbors. You can proactively provide helpful tips, articles and resources that guide them through this transition.

8 LOYALTY



Intent: Create community advocates

During the Loyalty stage, the consumer's emotions are high and benefit from positive reinforcement. Your objective is to build and maintain high satisfaction and retention.

Key Performance Indicators

- Resident satisfaction scores
- Staff satisfaction scores
- Referrals
- Online reviews
- Move-outs (negative-not attrition)
- Occupancy
- Resident retention rate
- Staff retention rate
- Average length of stay

Marketing Tactic Considerations

- Reputation management
- Public relations initiatives
- Social media
- Resident and staff satisfaction surveys



OMNICHANNEL TIP

Use earned media relations and online reputation management to build the credibility of your community. Maintaining a positive reputation helps ensure a more effective sales 'engagement with your prospects, leads and their family members.

An effective media relations strategy helps build organic, word-of-mouth influence and supports differentiation from the competition. How your community is positioned through ratings and reviews is equally important, because it reflects the customer's point of view. Ongoing review management demonstrates you're listening and engaged with your audiences and positively impacts search rankings.

With proper management that remains focused on your community's purpose, a positive reputation will have your audience asking questions about your community that lead them to becoming a committed future resident.

CONCLUSION

CONCLUSION



A strategic omni channel marketing approach utilizing the senior living buyer's journey will create seamless consumer experiences that increase the quality of your leads, shorten your sales cycle, and keep your occupancy predictably high.

As each consumer moves along their buying trek toward your community, personalized messaging and communication will keep them educated and more ready to buy at each step- until they become committed, loyal residents.