

your senior living crm



# WelcomeHome

How to use your marketing automation tools  
to ease the sales process and boost  
online conversions and move ins

Learn how The Arbor Company uses  
bi-directional HubSpot integration  
and WelcomeHome data to improve  
results for online leads.

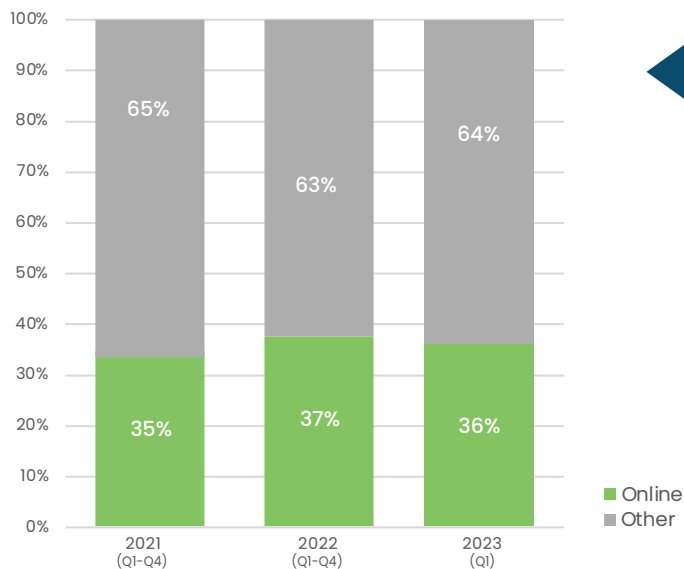


visit [welcomehomesoftware.com](https://welcomehomesoftware.com)

## industry background

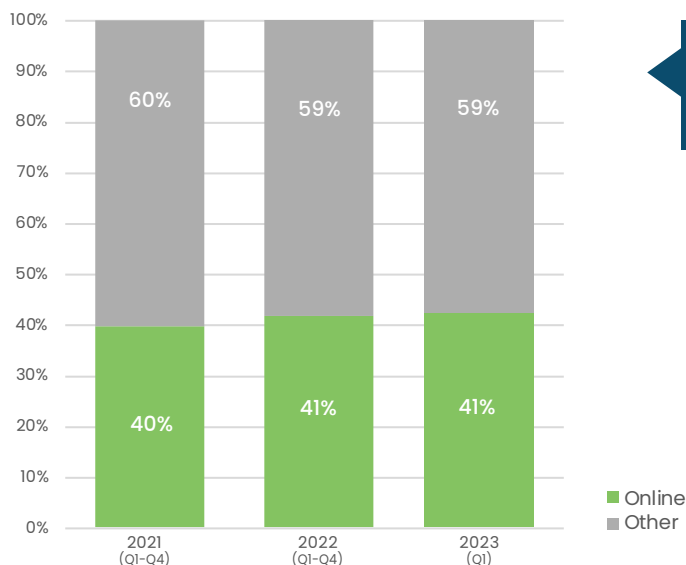
As an industry, we're seeing more and more of our leads come from online lead sources. In January '22, the average WelcomeHome community had ~14 online leads per 100 units per month, by March '23 it was ~16 per 100 units. But these online leads are often lower quality and harder to convert. In 2022, only 6% of leads from online sources moved in. In this new reality, we have to find new strategies to drive move ins. Having tools to better nurture online leads and recover lost leads will be critical.

## Share of inbound leads



In Q1 '23, the Online category was responsible for 36% of the total leads sourced in the industry.

## Share of lost leads



In the same period, they were also responsible for 41% of the leads lost.

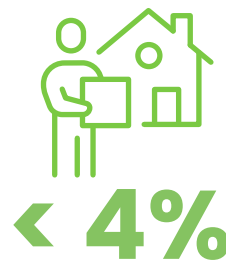


The Arbor Company has 40+ communities across care types, primarily focused on the East Coast. The company is a leader in the online space, and was one of the first operators to lean on online as a productive source of move ins. When Arbor switched to WelcomeHome in Dec. 2020, using data and automations to refine online lead strategy was top of mind. Today, Arbor employs tactical strategies to make the most of every online lead.

## the challenge

In 2020, The Arbor Company **recognized there was a greater opportunity to convert both new online leads and lost online leads to move ins.**

Shifting from **manual work (proven to be tedious and inefficient)** to **straightforward re-engagement strategies** utilizing new tools with transparent data was necessary to maintain Arbor's leading-edge status.



**2020 online  
lead to move in**



**20**

**hours per month of  
manual marketing work**

## Arbor needed a solution that would solve two core needs:

1. Better manage and nurture active online leads as they go through the marketing and sales funnel
2. Support strategic re-engagement of online leads that are lost

"A smart HubSpot integration was the number one criteria in our search. We needed better information to be able to make the most of our online leads and fine tune our sales process.

Since adopting WelcomeHome, it has easily saved us 20 hours of work per month."

-Mary Cate Spires

Marketing Consultant for The Arbor Company

## updating strategy

The Arbor Company diligenced CRMs, looking for a tool to support management of online leads. In Dec 2020, Arbor switched to WelcomeHome. From there, Arbor's team was able **to tailor marketing and preemptively prepare and nurture potential prospects even before they reach the sales team.**



## the results

By the time the online leads went through the marketing automation process, they were better informed and more prepared to move quickly through the sales process. From a sales perspective, the sales team knows more about a prospect's needs and readiness, which supports building a more tailored sales process.

**65 vs. 86**

*Arbor vs. Industry length of sales cycle for online leads*

**591 vs. 308**

*Arbor vs. Industry LOS for online leads*



## updating strategy

The Arbor Company's next step was to set themselves up for success with lost or closed online leads. Arbor set up closed loop reporting to send prospect fields back to HubSpot from WelcomeHome, such as: contact type, last contact date, prospect traits, stage and lost lead/close. They then set up customized **close reasons**. Detailed close reasons enable Arbor to better understand the opportunity to re-engage a lead.



Detailed close reasons, and other fields like last contact date, and stage at close can inform tailored, automated re-engagement strategies that push relevant content to the highest opportunity prospects to re-engage.



## the results

The Arbor Company's lost lead re-engagement strategies using bi-directional integration yielded immediate results across communities. Around 600 additional move ins for the year translates to about 1 move in per community per month for Arbor.

**10%**

of lost leads in 2022  
were re-engaged

**30%**

of re-engaged leads  
moved in

**600**

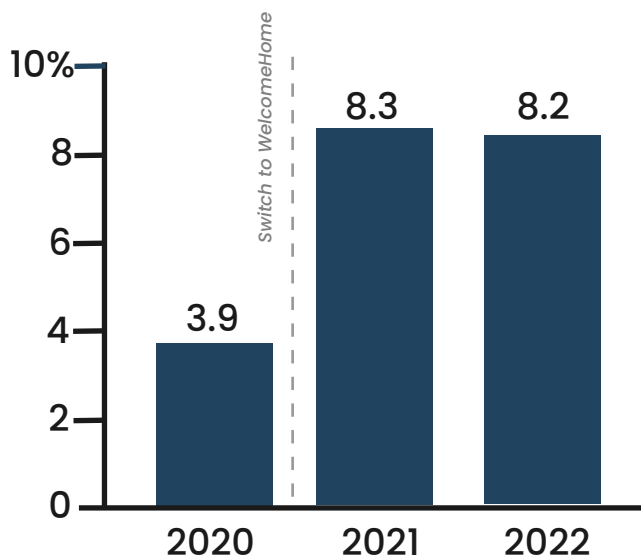
move ins from  
re-engaged leads

## the wins

These wins translated into success for the topline. Arbor was able to quickly **drive up online conversions and move ins**, which translated to a consistent **improvement in occupancy**; in 2022, 23% of Arbor's move ins came from online, compared to 20% for the industry.

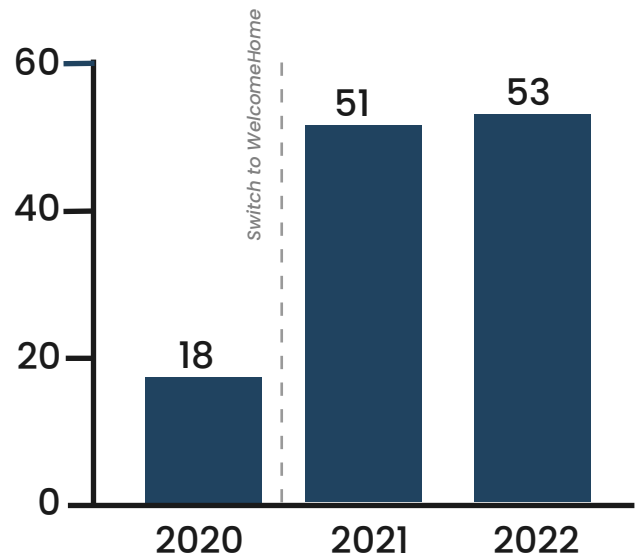
## Average online conversions

Setting up automations and smart online lead re-engagement strategies drove up conversion above industry average (6% in 2022)



## Average monthly move ins from online

In 2022, Arbor's occupancy performance beat industry averages by more than 5 occupancy points



# 14 pt

occupancy gain since implementing  
bi-directional marketing and WelcomeHome

## Next Steps For You

### Turn on your closed loop marketing automation

You're flying blind without having a strategic bi-directional marketing automation.

### Focus on quality over quantity

Use the data to refine your strategy. What online lead sources have worked for you? How can you narrow your criteria to find more qualified leads?

### Mine for gold in your database

Set up automations to re-engage lost leads using thoughtful, customized lost lead reasons.

## Our Marketing Automation Integrations



HubSpot

act-on

Constant  
Contact

ActiveCampaign >

ActiveDEMAND

Questions? Reach out to your CSM to setup your online lead engagement and automation strategy.

Contact Us