



Marketing Automation Relieves Staff Bandwidth & Expedites Customer Journey



Case Study:

Marketing Automaton
Multiple CR Clients

Industry:

55+ & Senior Living



SCAN ME

The Situation

Sales and marketing teams handle many new leads coming in daily. Staff can spend most of the time organizing leads, prioritizing, and ensuring those leads get exactly what information they require. That information can take the form of a brochure requested, directing them to the website for answers, or setting up a one-on-one meeting. This process takes up time, which is a valuable resource, that could be used on building relationships with leads that are further along the pipeline.

The leads themselves may visit a client website due to an ad they have seen in the market, or click on a digital advertisement served to them, but unless they receive prompt follow-up, due to the busy nature of their lives they may forget all about the community they engaged with digitally.

Strategy

By utilizing marketing automation, communities can communicate with leads automatically - without the pressure of having to send information manually from their internal sales & marketing team. Automation platforms like HubSpot and SharpSpring allow for all digital activity of leads to be tracked, and for automated email marketing to be sent to leads when they meet specific customizable criteria. The criteria can be broad or specific, depending on the customer journey and action that triggered the lead's digital activity.

By linking the typical customer journey with automated messaging, leads are provided with the right information at the right time. This automated information distribution provides the lead with information commonly asked at each decision stage, and with nothing manually required of the client team. And best of all, by integrating the automation tool with the sales & marketing team's CRM, digital activity can be connected and found within the tool the team is working within daily.

Marketing Automation Workflow Example

Length: Approx. 2-3 Months



Solutions

Creating Results recommends that all clients utilize an appropriate level of marketing automation according to their goals and budget. The first step in getting started is to determine the typical customer journey and subsequent needs for each journey stage. Communities each have varying target audiences that require unique messaging best for each stage

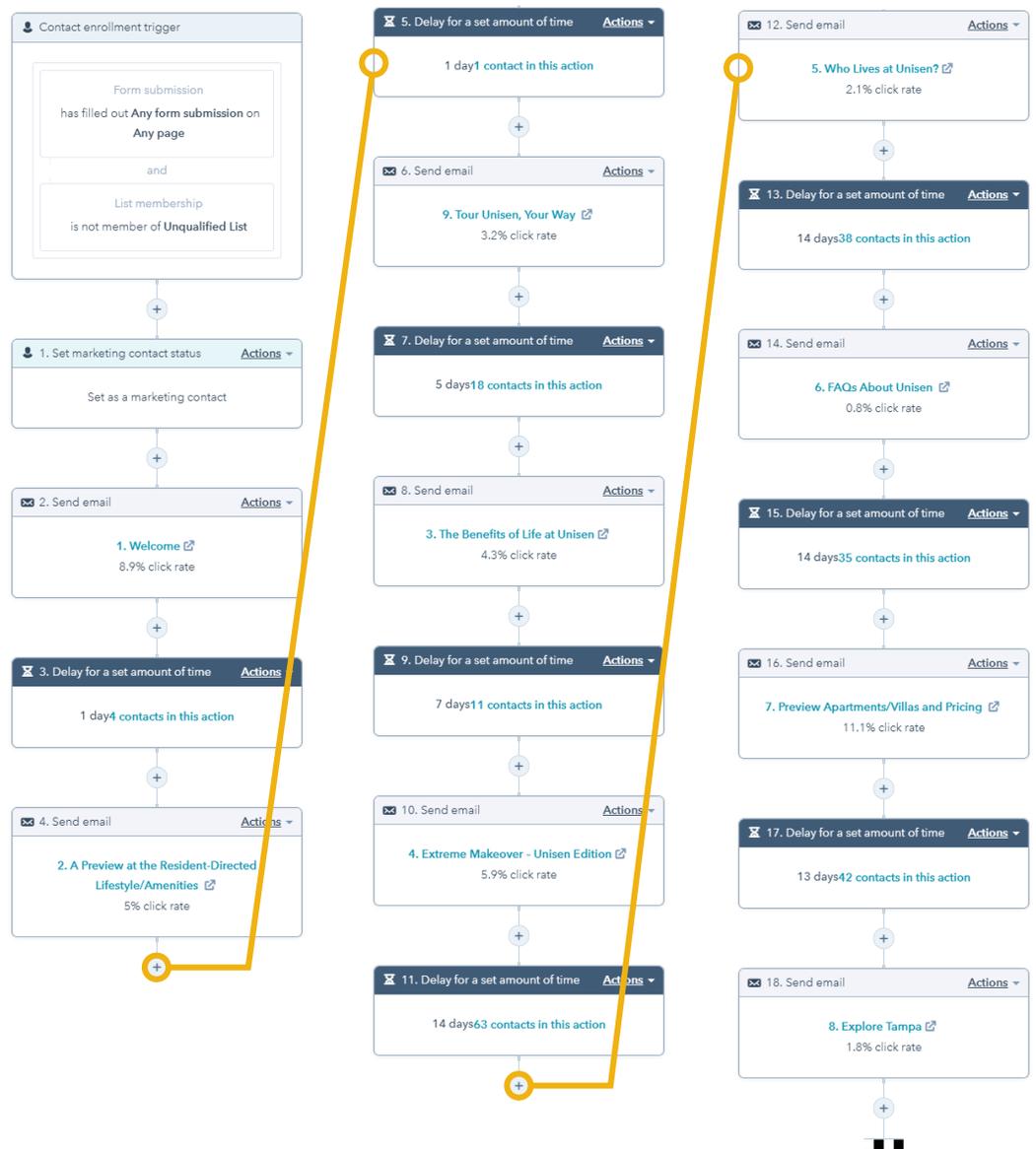
of the journey to be most effective. Once the stages and needs are determined, comprehensive marketing automation mapping and programming can begin within a proven marketing automation platform. Creating Results is platform agnostic, we are committed to adapting our proven strategy to pre-existing client platforms, when needed.

Solutions (continued)

We partner with communities during the mapping and programming process to ensure that both the anticipated customer needs and the client sales & marketing needs are met. Once the journey strategy is solidified and platform setup essentials are in place, Creating Results develops the determined series of automated email sets (these are also commonly known as email drip programs). This varies by community depending on services offered, levels of care provided, and customer journey models. In tandem, engagement workflows and triggers are created within the tool, so the right users are set to receive the right message, at the planned time.

Additional workflows, triggers and messaging can be – and often are – added after launch as our team monitors user behavior within the initial messaging. Automated messages can be programmed to deploy based on future website activity. For example, if a lead visits a certain floor plan page multiple times in each period, an automated email can be sent to them providing more information on that floor plan and encouraging a tour. Or if a lead often checks the upcoming events page or has RSVP'd for prior events, they can be added to a list so that every time a new event is added, they receive an automated message.

EXAMPLE AUTOMATION WORKFLOW



Results

As a result of implementing marketing automation, Creating Results clients enjoy above-average engagement across the board. Open rates regularly exceed industry benchmarks by over 20%. What is more impressive is the click-through of those who open the email and then interact further also exceeds benchmark rates. Client email lists also benefit from regular cleanout, as those who make another decision or are no longer interested unsubscribe to relieve their inbox. This ensures that the domain's email reputation is in good standing so it is not flagged by spam filters. Those who remain can receive automated nurturing and information – without the manual effort of the client sales teams. Clients can always know what digital messages the incoming leads have engaged with, which is valuable to subsequent conversations they have with leads. Marketing automation has improved the frequency



11 Message Drip Campaign

9 out of 11 messages include a **Book a Meeting/Schedule a Tour button** and has resulted in **10% more tours** and a **faster rate of sale** (from 3% to 5% lead to sale and sales timeline in less than a year).

Since Implementation in 2020:

13,012 Messages Sent

24.92% Open Rate

3.5 Click-Thru Rate

42.4%

Average open rate amongst ALL CR Clients

(Industry Benchmark: 18-20%)

11.5%

Average click-thru rate amongst ALL CR Clients

(Industry Benchmark: 2-3%)

everything mature consumers experience

Creating Results is a generational marketing agency with more than 25 years of experience in senior living and 55+ housing. Exclusively focused on 50+ audiences, we design solutions for each client's competitive landscape, assets and goals.

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