

Lead to success:

A guide to lead management with **Enquire by Aline CRM**



Managing leads and optimizing move-in processes are essential for senior living communities to maintain high occupancy rates and ensure resident satisfaction. Communities often contend with cumbersome and outdated processes, which can lead to delays and missed opportunities.

Enquire by Aline is an advanced CRM solution designed to help eliminate these challenges, specifically addressing the unique needs of senior living communities. It can help enhance efficiency by automating data entry and messaging and pre-populating electronic leads to streamline the conversion process, saving time and money.

What is Enquire by Aline?

Enquire by Aline is a CRM that streamlines lead management for senior living communities by helping to shorten sales cycles, while improving decision-making through actionable insights with real-time analytics for a seamless lead management process.

CUSTOMER RELATIONSHIP MANAGEMENT

Integrate with your business systems and processes to help increase admissions, gather enhanced data, and create an exceptional experience for your patients. Also integrates with MatrixCare's EHR software to capture all inquiries in one place.

CONTACT CENTER

Help convert leads faster for better occupancy. Save money spent on staffing and technology and streamline admissions with our industry-leading contact center solution.

BUSINESS INTELLIGENCE

Access and analyze data with an advanced framework of innovative tools and more than 100 report and dashboard templates you can easily customize.

How does Enquire by Aline transform lead management?

Designed to manage lead and lead source interactions, notes, and schedules all from one accessible platform. Business and market analytics help shorten sales cycles, improve occupancy rates, and maximize profitability through data collected at point of interaction.



Having the Aline CRM with a MatrixCare integration is a game-changer. With the way we can send information across communities and teams...it has allowed us to be so much more productive and improve our current processes, and we have more time to focus on our patients.

Jen Barnhart

Director of product integration and business development, CarDon

HOW IT WORKS:

- STEP 1** Prospective resident or family member inquires about your community through a lead source. Electronic leads pre-populate into the CRM and sales is notified.
- STEP 2** Auto-responder is sent. Contact center calls prospect within two minutes.
- STEP 3** Prospect and/or family members schedule tour.
- STEP 4** An automated email or text message is sent confirming the tour.
- STEP 5** An automated post-tour survey and thank-you message is sent after the tour.
- STEP 6** Resident moves into community and record is updated in the CRM.
- STEP 7** Thank-you message and real-time crisis notifications are automatically sent as needed.
- STEP 8** Residents and family members continue to receive community updates and information.

YOU CAN EXPERIENCE:

REDUCED DATA ENTRY

Integrates with marketing automation, billing systems, and electronic contracts, appending necessary demographic and financial information in real time.

AUTOMATED WORKFLOWS

Manages the pipeline with configurable workflows that prompt users through each sales step.

INCREASED TIME SAVINGS

Utilizes customized document and email templates and integrates with e-signature platforms like DocuSign for efficiency.

CUSTOMIZED INTERFACE

Allows changes to terminology and field labels for ease of use by existing staff.



UP TO:

4%

INCREASE
occupancy within the first six months

35%

INCREASE
inquiries captured

12%

INCREASE
move-in conversions

BENEFITS AND KEY FEATURES:

SEAMLESS INTEGRATION Connect with existing systems, marketing automation tools, billing systems, and electronic contract platforms to help facilitate the consolidation of data, ensuring all information is centrally accessible and manageable.

LEAD CAPTURE AND PROFILE Capture essential data as leads come in from various sources and append demographic, social, and financial information to each lead's profile in real time to help tailor communications and offerings specific to each prospect's needs and preferences.

WORKFLOW AUTOMATION Save time with automated workflows that can be configured to a community's specific needs to help guide that sales team through the sales process.

TRACK LEADS AND PERFORMANCE Track sales conversion and life cycle by location, care level, market source, and sales team member and map leads to outreach activity in real-time.

REAL-TIME NOTIFICATIONS AND REMINDERS Maintain engagement with leads through automatic prompts for follow-ups and leverage calendar tools to help schedule tours, meetings, and follow-up calls efficiently, making sure all interactions are logged and none are missed.

CUSTOMIZATION AND USER ACCESSIBILITY Custom terminology and field labels can match the language and processes familiar to your staff and customizable templates for documents and emails are available to help generate necessary communications quickly.

ANALYTICS AND REPORTING Upload marketing budgets and sales goals to compare against actual performance metrics and create custom reports and dashboards to provide insights into the effectiveness of various sales activities and strategies, helping leadership understand what works and what needs improvement.

INCREASED CONVERSION RATES Make more informed decisions quicker with comprehensive insights and streamlined processes helping to improve move-in rates and overall occupancy.

Enquire by Aline enhances lead management for senior living communities, helping to ensure high occupancy rates and resident satisfaction. By automating and streamlining every step of the lead management cycle—from initial inquiry to resident move-in—this advanced CRM solution not only saves time but also improves the accuracy and effectiveness of sales efforts. With its integration capabilities and real-time analytics, it can help communities convert leads faster and more efficiently, creating a better experience for staff and residents.

Contact us at **866.469.3766** or visit **matrixcare.com** to request a consultation or to learn more.